



## **PleaseReview v4.2 User Manual**

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## 1 Overview

### 1.1 Introduction

This document is designed as a reference source for users of PleaseReview. The intention is not to document every aspect of PleaseReview but to ensure that users can use PleaseReview effectively to collaborate on a review.

### 1.2 Overview of the System

PleaseReview is designed to facilitate the collaborative authoring and review of documents. The application is designed around 'roles', 'reviews' and 'workgroups'.

**Document Formats:** For the review of documents, PleaseReview is designed to work directly with Microsoft Word, Microsoft Excel, Rich Text Format, Microsoft PowerPoint and PDF documents as well as images, image collections, plain text files and various software code modules. Other document types are handled at a document level (i.e. for those document types not directly supported, comments can only be made on the complete document rather than on individual parts). For directly supported document types it is possible to comment on individual words, cells, paragraphs and image locations. The exact granularity of commenting depends on the document format itself.

The collaborative authoring features works directly with Microsoft Word.

**Roles:** There are seven main roles in PleaseReview and individuals can be allocated different roles (or a combination of roles) in different workgroups.

- **Owner:** the review Owner sets up and is in control of the review. An Owner can initiate a review (selecting the document(s), participants, allocating various roles to the participants, and setting other parameters of the review), set up personal distribution lists, monitor the review, participate in the review, accept and/or close other Reviewers' comments/changes, close-out the review, retrieve the marked-up Word document(s), PDFs and reports (for other formats), and complete the review (i.e. make it read-only or archived). There can only be one Owner per review but review ownership may be transferred;
- **Author:** The review Owner automatically has Author permissions but can appoint additional Authors, so there can be multiple Authors in each review. Authors are able to accept and/or close other Reviewers' comments/changes;
- **Contributor:** Contributors are review participants who are also able to edit an allocated part of a Word document ("EditZone") using Microsoft Word itself. The 'Contributor' role is only valid when a Word document is included in the review. There can be multiple Contributors in each review;
- **Super-Contributor:** a Super-Contributor has all the permissions of an Author and Contributor combined. They are also able to assign EditZones to themselves anywhere in the document and open any paragraph directly in Word for editing;
- **Reviewer:** Reviewers are participant types able to add comments and, for certain document types, propose changes to the documents. A Reviewer can reply to other Reviewers' comments and there can be multiple Reviewers in each review;
- **Viewer:** Viewers are participant types able to view the documents in the review (and all associated comments, proposed changes, replies, etc.), but

see the review as read-only and cannot participate. Thus, Viewers are not able to add comments or propose changes, etc. There can be multiple Viewers in each review. Note: When using ReviewZones, an Owner can restrict participants who are Reviewers to be Viewers on specific areas of the document;

- **Workgroup Administrator:** this is an ancillary administration role. The functionality available to the Workgroup Administrator is controlled by the PleaseReview system policy, which controls the overall behavior of PleaseReview. However, depending on system policy settings, the Workgroup Administrator can set up workgroup distribution lists, add users to the workgroup and undertake workgroup management such as transfer of review ownership;
- **Monitor:** this is an ancillary oversight role. Monitors may enter any review in their workgroup(s) as a Viewer (i.e. with 'read only' access). This allows quality assurance (QA) or management oversight of the review process and is workgroup-based.

**Reviews:** PleaseReview is designed around 'reviews'. An Owner initiates a review and invites participants to review and/or (for Word only) edit the document(s). The Owner specifies the participant's role in the review during set-up. A review can contain multiple documents which can be of different types. A document in a review may be read-only (i.e. included in the review for reference purposes). The participants, by default, receive e-mail notification of the review invitation and it appears on their personal review list. Participants who have not set their review status to 'Completed' will receive up to three email reminders of the approaching review deadline at intervals defined by the Owner.

During the review, participants can undertake activities according to their review role as noted above. For example, Reviewers can make comments and propose changes to the document(s). For image formats, comments may be made on a selected area. PDF format supports both text (for text-based PDFs) and graphic comments.

At the end of the review the Owner can download a document containing the selected changes (for Word, Excel and PDF<sup>1</sup> documents and plain text files) or review a reconciliation report (for other document types). The Owner can then notify Reviewers that the review is closed and select the 'Completed' option on the menu so that the review is now archived and read-only. The Owner can choose to close the review early, if required, or extend the review deadline.

**Review Types:** PleaseReview is designed as a collaborative review solution. In addition to the single stage collaborative review, PleaseReview also supports:

- **Independent reviews** - In an independent review participants do not see each other's comments and are not even aware that there are other participants in the review. The Owner, however, sees all participants' comments and proposed changes. By definition, an independent review removes features which allow participants to collaborate;
- **ReviewFlow reviews** - ReviewFlow provides functionality for multi-phase reviews (i.e. sequential reviews). A ReviewFlow review is managed

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<sup>1</sup> Users must have a full copy of Acrobat Standard or Professional (i.e. not the free Adobe Reader) installed on their PC and the PleaseTech PDF plug-in.



centrally by the review Owner but each phase appears as a separate review to Reviewers. ReviewFlow phases have full review options for each phase so could, for example, be independent for one phase and then collaborative for another phase.

**Workgroups:** A PleaseReview installation may have multiple workgroups. Workgroups are a useful way of logically separating types of reviews. For example, each department within an organization may have a workgroup, and/or you may have a workgroup per client and/or per project, etc. Each user exists only once in the system but can have different roles in different workgroups. For example, a user may be a Workgroup Administrator in one workgroup, a Contributor in another and be limited to a Reviewer in further workgroups. In such cases, users are only counted once for license purposes.

To review a document, a user must be a member of the workgroup in which the review is taking place and included in the review as a participant.

Care must be taken when considering workgroup roles against review roles. In order to have a specific role in a review the user must have that role in the workgroup otherwise the review role cannot be assigned.

Workgroup roles are Author, Reviewer, Contributor, Viewer and Monitor. These roles define the possible role the user can have in a review in the specific workgroup.

Review roles are the roles assigned to the review participant by the review Owner. In order to become a review Owner the user must have 'Author' permissions in the workgroup. The review Owner can then assign review roles to other participants based on their workgroup privileges.

**Taskgroups:** Taskgroups are a flexible implementation of the more rigid workgroup model and are designed to allow users from multiple workgroups to participate in the same review. Taskgroups are designed to be a self-maintaining temporary environment for cross workgroup collaboration.

### **1.3 Other Information Sources**

PleaseReview includes on-line help (both PDF & HTML versions of this manual with additional information) which can be accessed via the 'Help' link on the top menu. PleaseReview also makes extensive use of 'Tool tips'. If in doubt, hover the mouse over the link or command for further information.

The help information is entirely separate from the PleaseReview application and may be upgraded even if there has been no application upgrade.

There are free online training movies at [www.pleasetechsupport.com/training](http://www.pleasetechsupport.com/training)

### **1.4 System Policy**

PleaseReview has a system policy which allows the system administrator to specify the behavior of certain aspects of PleaseReview by making specific features available or not. Thus, if a feature is discussed '(if available)' this means that it may not appear on your system as the functionality may be 'turned off' at system policy level.

### **1.5 Localization**

PleaseReview includes support for 'language packs' which can be used for localization and the customization of screen descriptions. This document uses the default English language in all screenshots.

Use of the localization feature and language selection is beyond the scope of this manual.

### **1.6 Notes**

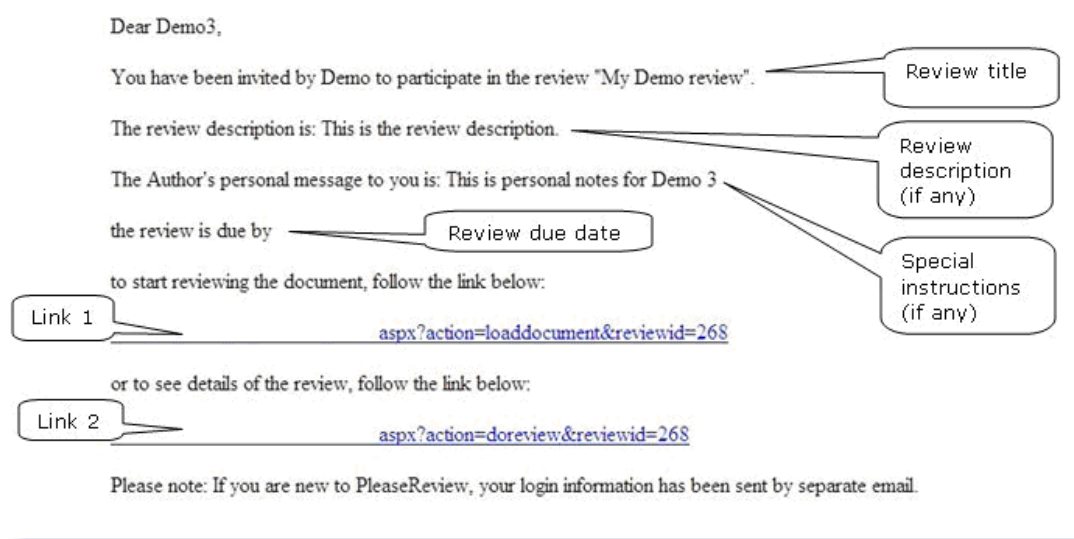
If features are not explained when first mentioned they will be covered later in the document.

## 2 Accessing a Review

There are two ways you can access a review. Either via the invitation email or by logging in.

### 2.1 Invitation Email

Most users' first interaction with PleaseReview will be when they receive an email invitation to participate in a review.



Notes:

- The invitation email contains the review title, a review description (if any), the special instructions (personal message) from the Owner (if any) and the review due date and time;
- Selecting the first link ('Link 1' shown above) takes you directly into the review where you will view the document(s);
- Selecting the second link ('Link 2' shown above) takes you to the review control panel. The review control panel screen shows summary information about the review, including the review's participants and the details of the document(s) included in the review. You can enter the review from the control panel;
- If the link is broken or incomplete, you will need to copy it into your browser address bar, making sure that it is complete.

Note: The invitation email is customizable for each installation. The above example is the default. Your email may be different.

## 2.2 Accessing a Review by Logging On

If you Login to PleaseReview directly you will be taken to your review inbox where you will see a full listing of all your reviews.




### my reviews

Reviews I'm in

Search for reviews

My status is ☒ Not started ☒ In progress ☐ Completed
 Include: ☐ Closed reviews ☐ All workgroups

refresh

Due Date ▼	Title	Owner	Review Status	My Status	Details	Review
17 Sep 2011 23:45	 ReviewZones	Sue	Overdue	In Progress	<a href="#">Select</a>	<a href="#">Enter</a>
7 Sep 2011 23:45	 review zones ++	Sue	Overdue	In Progress	<a href="#">Select</a>	<a href="#">Enter</a>
2 Sep 2011 23:45	 new review	Sue	Overdue	In Progress	<a href="#">Select</a>	<a href="#">Enter</a>

To enter the review without seeing the review details, use the 'Enter' link. To view the review details, use the 'Select' link. This takes you to the review control panel.

The information on this screen is covered in the following section in more detail.

### 3 Common Information

#### 3.1 Logging In (Remember Me and Forgotten Password)

**PleaseReview™ login**

please enter your username and password

<b>User name</b>	<input type="text"/>
<b>Password</b>	<input type="password"/>
	<input type="checkbox"/> Remember me
	<input type="button" value="Login"/>

[Forgotten Password](#)

If you see an 'Advance options' link or a drop-down selector on the login screen, you are using a PleaseReview System Connector for a 3<sup>rd</sup> party system. Please refer to [APPENDIX A – System Connector Integrations](#) for more information.

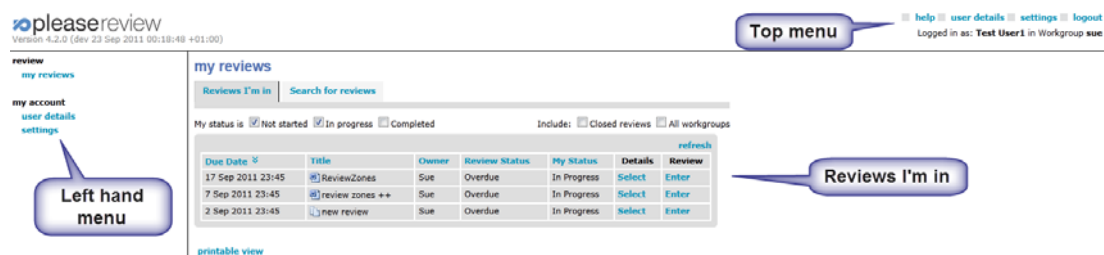
The PleaseReview login screen has a 'Remember me' check box (if available) and a 'Forgotten Password' link (if available).

**Remember Me:** Checking this box will mean that in future you will automatically be logged into PleaseReview when you access it from the same user profile on the same computer. You can clear the 'Remember me' setting by selecting 'Logout' from the top menu followed by 'Clear My Details'.

**Forgotten Password:** If you have forgotten your password, select this link. You will be prompted for your email address. This will automatically generate an email to you which contains a link to reset your password. Click on the link in the email and follow the instructions. Your new password will take immediate effect and you will then be able to Login to PleaseReview. If 'Forgotten Password' is disabled on your installation and you have forgotten your password, you will need to contact your system administrator.

#### 3.2 Logged In

Once you have logged into PleaseReview, you will automatically be taken to the 'Reviews I'm in' tab, unless you are a review Owner with open reviews in which case the 'Reviews I own' tab will be displayed.



**Top menu:** help user details settings logout  
Logged in as: Test User1 in Workgroup sue

**Left hand menu:** review my reviews my account user details settings

**my reviews**  
Reviews I'm in Search for reviews

My status is ☒ Not started ☒ In progress ☐ Completed Include: ☐ Closed reviews ☐ All workgroups

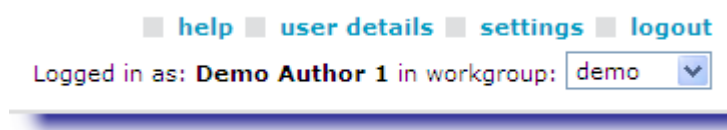
Due Date	Title	Owner	Review Status	My Status	Details	Review
17 Sep 2011 23:45	ReviewZones	Sue	Overdue	In Progress	Select	Enter
7 Sep 2011 23:45	review zones ++	Sue	Overdue	In Progress	Select	Enter
2 Sep 2011 23:45	new review	Sue	Overdue	In Progress	Select	Enter

printable view

**Reviews I'm in**

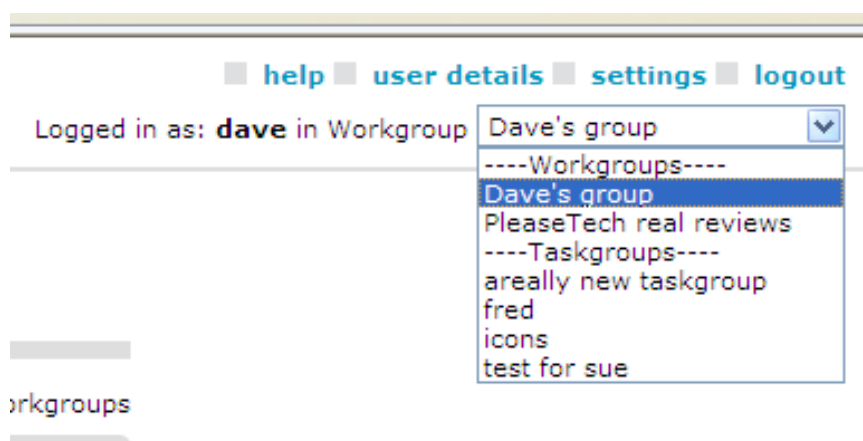
### 3.3 Top Menu

Once logged into PleaseReview, there is a top menu as explained below:



Option	Description
help	Access to the comprehensive PleaseReview Help website
user details	Opens the user details options (fully described below)
settings	Opens the user settings options (fully described below)
logout	Logs the user out of the system (unless the user is in a review in which case it activates the review exit dialog).

If you are not in multiple Workgroups or Taskgroups, there will be no drop-down. The name of the Workgroup will simply be displayed. If you are in more than one Workgroup or Taskgroup, there will be a drop-down and it will list all Workgroups and Taskgroups you are in.



Note: By default the top menu is not shown when in a review (i.e. when the document is displayed). However, it is possible to change this setting and have the top menu available in the review.

### 3.4 Left Hand Menu

The left hand menu will be different depending on the role the user has in the workgroup as shown below:



### 3.5 User Details

Once logged in, all PleaseReview users have an option on the left hand menu called 'user details' under the heading of 'my account'. This option is also available on the top menu. This allows you to specify your default workgroup and to reset your password (if permitted).

#### edit your own user details


specify user details

User email address	Demo_Author_1@pleasetech.com
Login name	dal
User full name	Demo Author 1
Default Workgroup	demo

Old Password	<input type="password"/>
New Password	<input type="password"/>
Confirm Password	<input type="password"/>

### 3.6 User Settings

Once logged in, all PleaseReview users have an option on the left hand menu called 'user settings' under the heading of 'my account'. This option is also available from the top menu or from the  icon on the toolbar.

This allows you to specify your personal preferences for several aspects of PleaseReview.

## user settings

user settings for Sue

**daily digest**

Send me a daily digest email
☐

**review preferences**

Automatic refresh	<input checked="" type="checkbox"/> 60 Interval in second(s)
Quick Accept	Off
Highlight Paragraph	<input type="checkbox"/>
Location of comments panel	Pop up
Default view	Normal View
Show tracked changes in document view	Show open changes as tracked
Default navigation	Contents
PDF review	<input checked="" type="radio"/> Use Acrobat plug-in <input type="radio"/> Review as images
Inline editing and Paragraph Toolbar settings	Use Inline Editing

Apply

Option	Description
Daily digest	If selected, the daily digest emails provide you with daily summary information on all reviews in which you are involved regardless of your role.
Automatic refresh	<p>If selected (if available) the comments and changes on the document in the review will automatically be refreshed when you add a comment or proposed change and/or at the interval specified.</p> <p>Note: The default refresh time is a minimum and you will not be able to set a more rapid refresh but will be able to set a slower refresh.</p>
QuickAccept	If 'on' is selected, Authors can accept/close comments with one click. 'Accept only' means that QuickAccept will only be activated when accepting comments or changes.
Highlight Paragraph	Replaces comment icons with paragraph highlighting for Microsoft Word and plain text documents.
Location of comments panel	Defines the location of the comments panel. This can be a pop-up window or a pane to the left or right of the document.
Default view	Defines the default document view. 'Normal' view displays the entire document without headers or footers whilst 'layout' view displays the document one section at a time with headers and footers.
Show Tracked Changes in document view	'Show open changes as tracked' will display the mark-up of open proposed changes in the document view. 'Show accepted changes as tracked' will display the mark-up of accepted proposed changes in the document view.




Default navigation	The default view of the navigation pane.
PDF review	If available, defines the method of commenting on a PDF.
Inline editing and Paragraph Toolbar settings	If available, enables inline editing for proposed changes and one-click functionality to insert private bookmarks.

The options presented to the user are given below:

Setting	Options Presented	Notes
QuickAccept	<ul style="list-style-type: none"> <li>Off</li> <li>On</li> <li>Accept Only</li> </ul>	'Off' is the system default.
Location of comments panel	<ul style="list-style-type: none"> <li>Pop-up</li> <li>Left of document</li> <li>Right of document</li> </ul>	'Pop-up' is the system default.
Default view	<ul style="list-style-type: none"> <li>Normal View</li> <li>Layout View</li> </ul>	'Normal view' is the system default.
Tracked Changes	<ul style="list-style-type: none"> <li>Off</li> <li>Show open changes as tracked</li> <li>Show accepted changes as tracked</li> </ul>	'Open changes as tracked' is the system default.
Default navigation	<ul style="list-style-type: none"> <li>Contents</li> <li>Comments</li> <li>Bookmarks</li> </ul>	'Contents' is the system default.
PDF review	<ul style="list-style-type: none"> <li>Use Acrobat plug-in</li> <li>Review as images</li> </ul>	The default is set by the system policy.
Inline editing and Paragraph Toolbar settings	<ul style="list-style-type: none"> <li>Use Inline Editing</li> <li>Toolbar Only</li> <li>Toolbar Off</li> </ul>	'Toolbar off' is the system default.

Notes:

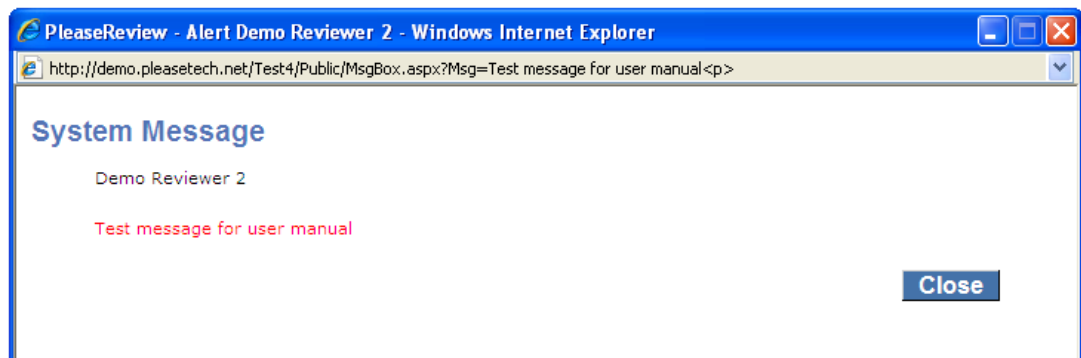
- It is possible to change the settings whilst in the review using the settings icon () on the toolbar. Changes will be applied upon refreshing the document using the 'hard refresh' on the toolbar. It is advisable that you cancel out of any inline editing before changing the settings.
- User settings take precedence over the system default settings.

### 3.7 System Alerts

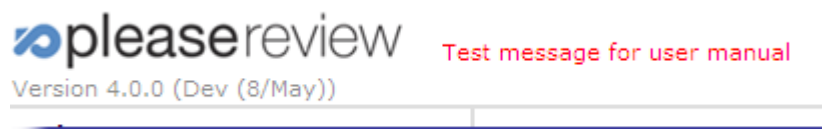
The system administrator can issue system alerts. This is, typically, to advise or remind logged-on users that the system will be re-started at a certain time (this

may be due to enhancements, a change of system policy settings, etc.) and thus the users should ensure that they have applied any comments.

A system alert will pop up a window as shown below:



And appear in the PleaseReview header window where it scrolls from bottom to top:



## 4 Reviewing Documents

### 4.1 My Reviews



'My reviews' is the review 'inbox' and lists all of the reviews to which the user is invited, regardless of their role in the review.

#### my reviews



[Reviews I'm in](#)
[Search for reviews](#)

My status is ☒ Not started ☒ In progress ☒ Completed
Include: ☐ Closed reviews ☒ All workgroups

refresh

Due Date 	Title	Owner	Review Status	My Status	Details	Review
6 Jun 2010 23:45	 Dave's review	dave	In Progress	In Progress	<a href="#">Select</a>	<a href="#">Enter</a>

[printable view](#)

The review listing may be sorted by clicking on the column headers. The  or  indicates which column the list is currently sorted by and the direction of the sort (ascending and descending respectively).

Due Date 	Title	Owner	Review Status	My Status	Details	Review
21 Jun 2010 12:13	 User Manual Phase 1	Jane	Overdue	Completed	<a href="#">Select</a>	<a href="#">Enter</a>

The review due date and time is shown in the first column (column 1). The review title (column 2) includes the review's title and an indication of the document types in the review. Column 3 indicates the review Owner.

Under 'Review status' (column 4) the following may be displayed:

Status	Description
In Progress	The review is in progress and the scheduled due date has not been passed;
Overdue	The review is still open for comment but the scheduled due date has passed;
Closed	The review has been closed by the review Owner. Review participants with appropriate permissions may still be accepting/closing comments;
Completed	The review has been marked as completed by the review Owner and is read-only for all participants.

Under 'My status' (column 5) the following may be displayed:

Status	Description
Not Started	Reviews that you have not personally started reviewing. Other reviewers may have started reviewing;
In Progress	Reviews that you have started reviewing (i.e. entered the review to view the documents) but which you have not set your status to 'Completed';
Completed	Reviews that you have set to 'Completed' for your status but which are still open to review by you and others;

Offline      Reviews that you have set to 'Offline' for your status, or that you have downloaded using the Offline Review Client.

The reviews displayed in 'my reviews' are selected using the check boxes located at the top of the panel.

## my reviews

[Reviews I'm in](#)
[Search for reviews](#)

My status is ☒ Not started ☒ In progress ☐ Completed
Include: ☐ Closed reviews ☐ All workgroups

Notes:

- For 'My status' selections the 'In progress' option will include reviews for which your status is 'Offline';
- The 'Closed reviews' option includes 'Closed' and 'Completed' reviews;
- The 'All workgroups' option will include reviews in all Taskgroups.

'Mousing over' the 'Select' option displays a tooltip showing a subsection of the information held in the review control panel about the status of all review participants.

## my reviews

My status is ☒ Not started ☒ In progress ☐ Completed
Include: ☐ Closed reviews ☐ All workgroups

Due Date	Title	Owner	Review status	My status	Details	Review
1 May 2009 23:45	Document history play	Demo Owner	Overdue			
14 May 2009 23:45	pdf review	Demo Owner	Overdue			
14 May 2009 23:45	pp review	Demo Owner	Overdue			
14 May 2009 23:45	multiple docs	Demo Owner	Overdue			
28 May 2009 23:45	EditZone re-work test	Demo Owner	In Progress	Not Started	<a href="#">Select</a>	<a href="#">Enter</a>
30 May 2009 23:45	Version 4 User manual	Demo Owner	In Progress	In Progress	<a href="#">Select</a>	<a href="#">Enter</a>
5 Jun 2009 23:45	sample policy document	Demo Owner	In Progress	In Progress	<a href="#">Select</a>	<a href="#">Enter</a>

[refresh](#)

[printable view](#)

Name	Status	Summary	Comments
Demo Author 1	In Progress		0
Demo Author 2	Not Started		0
Demo Contributor 1	Not Started		0
Demo Contributor 2	Not Started		0
Demo Owner	Not Started		0
Demo Reviewer 1	In Progress		5
Demo Reviewer 2	In Progress		0
Demo Reviewer 3	In Progress		2
Demo Reviewer 4	In Progress		0

Mousing over the 'Select' pops-up the information tooltip

## 4.2 Searching for Reviews

The 'Search for reviews' tab allows you to search for a specific review.

## my reviews

[Reviews I'm in](#)
[Search for reviews](#)

Enter title or id  
Include: ☐ Deleted reviews ☐ All workgroups

[refresh](#)

Due Date	Review Title	Review Owner	Review Status	Details	Review
No reviews to display					

[printable view](#)

The search will return all reviews whose title starts with the value you entered.  
If you want to search for review titles containing certain characters, use \* as a wildcard. For instance, entering \*design will return reviews ending in design; entering \*design\* will bring back all reviews containing design.

The search will return all reviews whose title starts with the value you entered.

If you want to search for review titles containing certain characters use \* as a wildcard. For instance, entering "\*design" will return reviews ending in design; entering "\*design\*" will bring back all reviews containing design.

Notes:

- You will only be able to locate reviews in which you are a participant. The results will not contain any reviews to which you are not invited;
- The 'Deleted reviews' option will locate those reviews which are in the 'recycle bin' (if enabled). It will not locate reviews which have been permanently deleted.

### 4.3 Review Control Panel

#### review control panel - Document history play

Document history play (id 656)

<b>Description</b>	Sample review for document history
<b>Review Status</b>	Overdue ( <b>Due: 1 May 2009 23:45</b> ; Started: 20 Apr 2009 16:32)

participants

Name	Status	Role	Summary	Comments
Demo Author 1	Not Started	Reviewer		0
Demo Author 2	Not Started	Author		0
Demo Contributor 1	In Progress	Contributor		1
Demo Contributor 2	Not Started	Contributor		0
Demo Owner	In Progress	Owner		0
Demo Reviewer 1	In Progress	Reviewer		1
Demo Reviewer 2	Not Started	Reviewer		0
Demo Reviewer 3	Not Started	Reviewer		0
Demo Reviewer 4	Not Started	Reviewer		0

your comments

Document	Open	Accepted	Closed	Withdrawn
 Sample policy document	1	0	0	0

[Status](#) [Download copy](#) [Notify](#) [Editzone](#) [History](#)

[View Report](#)
[Enter Review](#)
[Back](#)

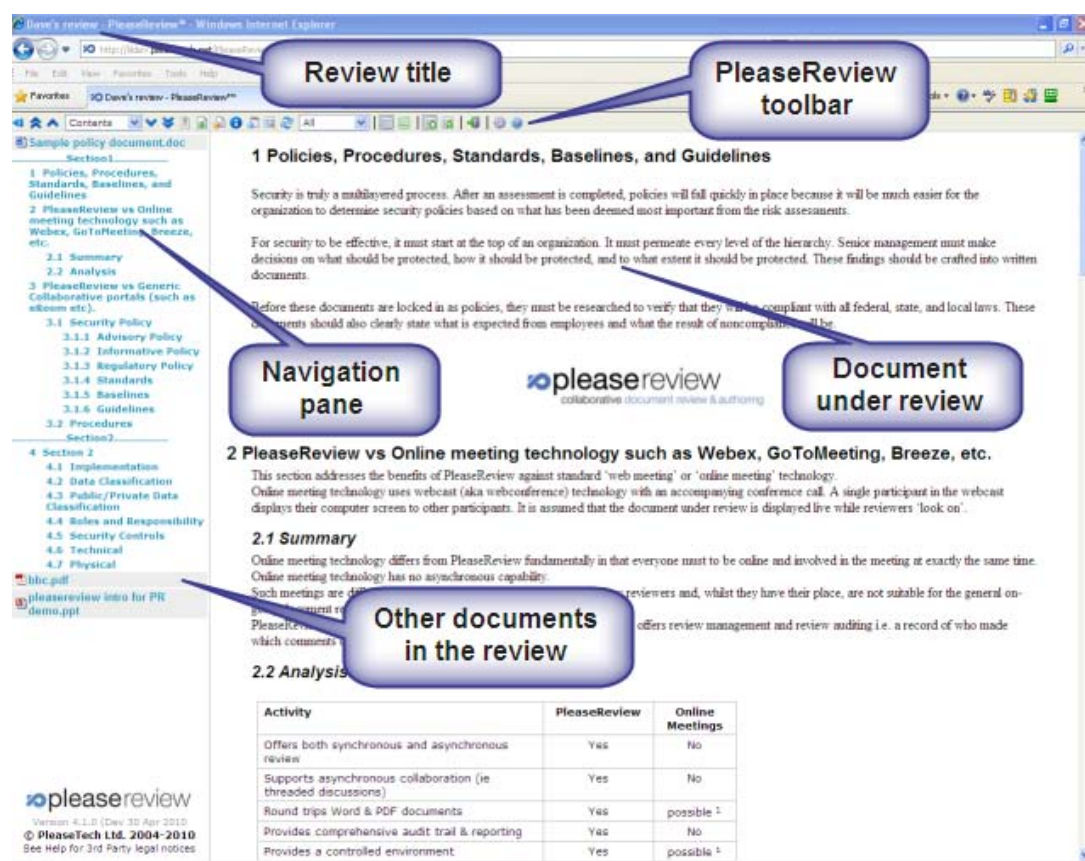
## Notes:

- The review control panel summarizes the review and your status within it;
- This is the screen accessed using 'Select' on the Details column in 'my reviews';
- The number and status of your comments is shown in the lower 'your comments' section. This is the status of your own individual comments and not the overall review;
- 'View Report' displays the comment reconciliation report.

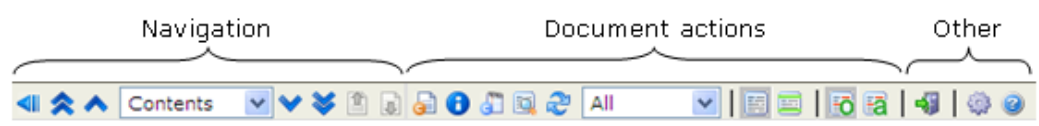
### 4.4 Reviewing a Document – the Review Environment and Controls

Once in the review, the document is displayed in the right hand 'Review pane' whilst the document's navigation is displayed in the left hand 'navigation pane' (as shown below). There is a toolbar across the top of the two panes which provides functions required for user interaction.

The review title is displayed in the Browser title bar. The overall environment is shown below:

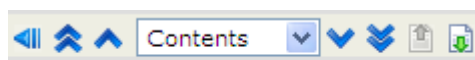


The toolbar, as shown in detail below, provides navigation, document actions and other actions and is split into discrete sections.

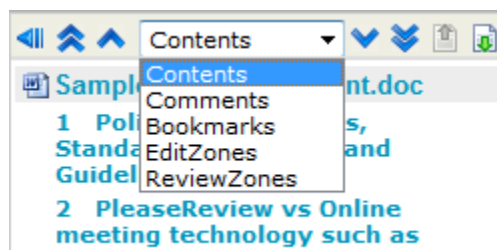


#### 4.4.1 Toolbar Detail

##### 4.4.1.1 Navigation Toolbar and Options



The central drop-down box allows the user to select whether navigation is by 'Contents', 'Comments', 'Bookmarks', 'EditZones' or 'ReviewZones'.

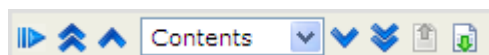


#### Icon

#### Description



Collapses or expands the left hand navigation pane. When collapsed the toolbar appears as shown below:



Takes the user to top/bottom of the document if browsing by 'Contents', or to the first/last Comment/Bookmark/EditZone as appropriate.



Takes the user to next/previous contents item if browsing by 'Contents' or to the next/previous Comment/Bookmark/EditZone as appropriate.



Takes the user to the next/previous document. If the icon is grayed out there is no document above/below the current document.

#### Notes:

- The navigation pane will show a list of all documents in the review with the navigation of the displayed document in the review pane expanded;
- To select other documents in the list (if any) click on their title (document titles have a light gray background);
- Clicking on the item in the navigation pane will scroll the document to the correct location and open the comment window (unless navigating by 'Contents').

##### 4.4.1.2 Document Actions Toolbar



The document action toolbar is split into several sections.

## General Actions



### Icon



### Description

Opens the 'General Comment' comment window to allow a Reviewer to make a general comment or view the general comments of others.



Opens the review control panel in a new window. This is a read-only version of the review control panel which simply displays the information associated with the review. No actions are available from this view.



Opens the reconciliation report in a new window.



Opens an original copy of the document. This is the same as downloading a copy of the document and the standard web dialog will appear.

Note: if the document in the review is made **not** available for reviewer download under the standard review options, then this action is not available.



Refreshes the document. This will re-load the document and all comments, etc. from the server.



The drop-down box allows the selection of which comments are displayed. Options are 'All', 'Open Comments' or 'Custom'. Custom can be used to display a customized selection of comments.

## View options



### Icon



### Description

View options: select between normal view and layout view.



Tracked Changes options: turns the open or accepted tracked changes views on and off.






Document comparison and linking (if available): see [Document Comparison and Review linking](#).

### 4.4.1.3 Other Actions on the Toolbar





Icon	Description
	Leave the review.
	Opens the user settings dialog.
	Opens the online help website in a new window.

Please note: In the event that PleaseReview is configured to display a header above the toolbar whilst viewing the document, the user settings and help icons will not be present. The actions will be available from the header links in the top right hand corner.

#### 4.4.2 View Options

There are two view options: 'Normal View' and 'Layout View'. Views differ according to different document types.

Doc Type	Normal View	Layout View
Microsoft Word	<p>Normal view can be thought of as equivalent to the 'Normal' view in Microsoft Word.</p> <p>Notes:</p> <ul style="list-style-type: none"> <li>The document's header and footer are not shown.</li> <li>The navigation pane displays all heading levels included in the selected document with section breaks shown.</li> </ul>	<p>Layout view is similar to 'Print Layout' view in Microsoft Word.</p> <p>Notes:</p> <ul style="list-style-type: none"> <li>The document is displayed on section-by-section basis.</li> <li>The section's header and footer are shown and it is possible to switch between the different header and footer styles (i.e. odd/even, etc.).</li> <li>The navigation pane displays heading levels on a section-by-section basis. Select the next section to display it.</li> <li>Where the headers and footers contain page numbers, the number displayed will always be the page number at the start of the section, regardless of the length of the section.</li> </ul>
Microsoft PowerPoint	<p>Normal view displays all slides with slide notes (if any) below each slide.</p> <p>The navigation pane displays all slides by title.</p>	<p>Layout view displays one slide at a time. This can be useful if you have a long presentation, a slow connection or wish to refresh regularly.</p>
Microsoft Excel	N/A	<p>Layout view displays one worksheet at a time.</p> <p>The navigation pane lists each worksheet.</p>
Image	Only normal view available.	N/A

Image Collections	Normal view displays all images on the same page with a separator between them.	Layout view displays one image at a time. This can be useful if you have a large image collection, a slow connection or wish to refresh regularly.
Plain Text	Displays the document.	<p>Layout view provides a split screen option which enables the Reviewer to navigate to two different places in the same document at once.</p> <p>Either screen area may be used for commenting. When you navigate using the navigation pane or comment window, the top pane is scrolled to the correct location. The comment pane (or window) will reflect the line most recently selected.</p>

#### **4.4.3 Tracked Changes Options**


There are two options for displaying tracked changes. You can select either 'Tracked Changes (Open)' or 'Tracked Changes (Accepted)' by clicking on the appropriate icon. Clicking again on the selected icon will turn off the view. The default system view is for Tracked Changes (Open) to be displayed.

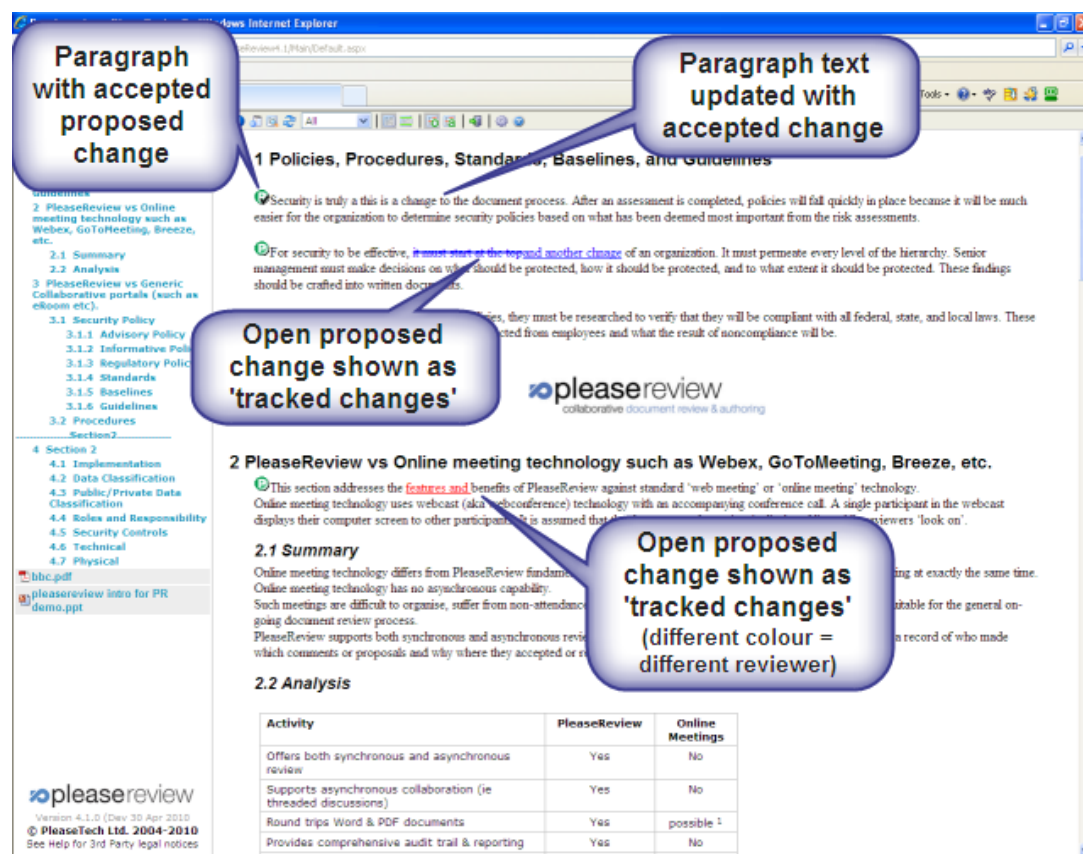
'Tracked Changes' view is only available for Word and Excel documents.

##### **4.4.3.1 Tracked Changes (Open) View**


The 'Tracked Changes (Open)' view shows proposed changes which are 'Open' (i.e. not accepted or closed) as tracked changes in the document. Accepted proposed changes are shown as inserted text. In other words, the document text has been updated with the accepted proposed change (see below).

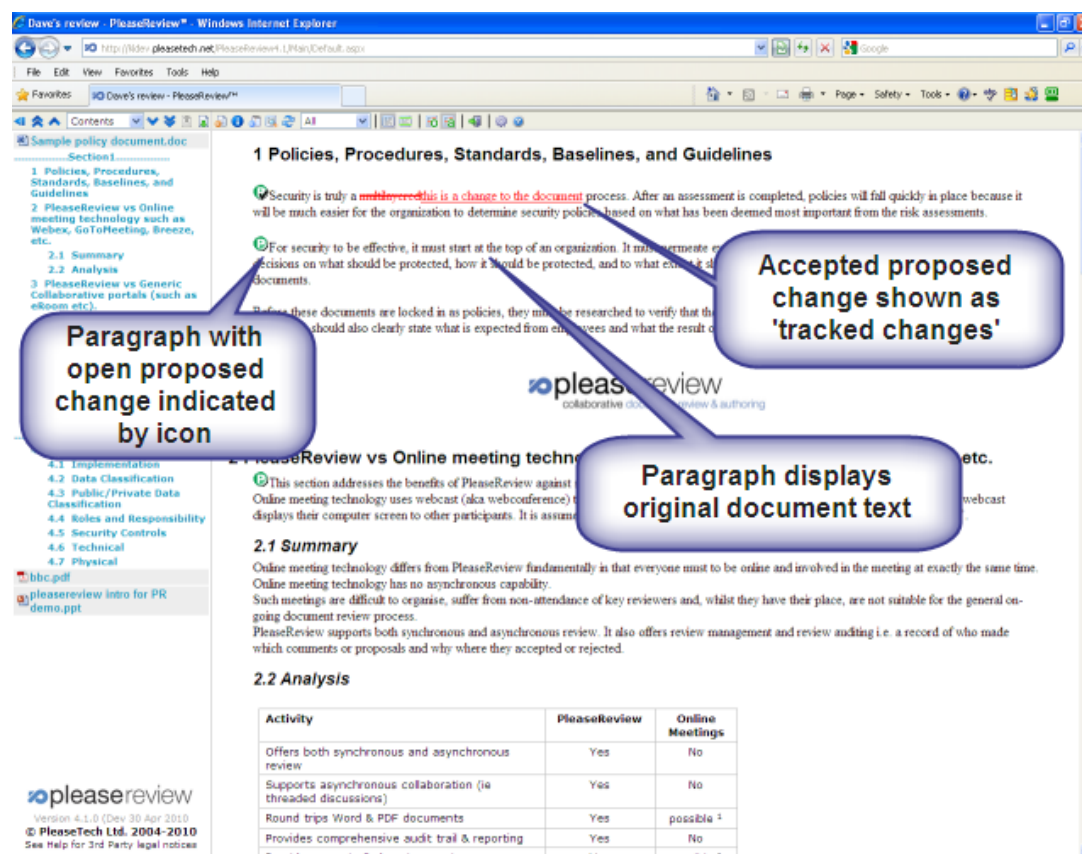
In this view, open proposed changes are presented in colored text with deleted text ~~struck-through~~ and inserted text underlined. The color is individual to the Reviewer on a per review basis.

The  icon indicates a paragraph with an accepted proposed change. In this paragraph the text has been updated to reflect the accepted proposed change.





#### 4.4.3.2 Tracked Changes (Accepted) View

The 'Tracked Changes (Accepted)' view shows proposed changes which are 'Accepted' as tracked changes in the document. Paragraphs with proposed changes which are 'Open' are indicated by the  icon in the normal manner with the original paragraph text.



#### 4.4.4 Custom Comment Selection


Selecting to display by 'Custom' comment selection opens a new window.

This window allows the user to select which comments are displayed. The comment icons shown in the document (e.g. , ) and the comments shown in the left hand navigation pane will reflect the comment selection.

Thus, if the user has selected to display a subset of comments, the selected subset is consistent in both the comments shown in the left hand navigation pane and in the comment icons shown in the body of the document in the right hand review pane.

#### 4.4.5 Images Within Word Documents

Due to the inherent design of browsers, images are scaled when presented. This can mean that an image becomes illegible.

When the user 'mouses over' an image, an icon (  ) appears in the top left hand corner of the image. Clicking on the icon opens the image full size in a new browser window. Clicking elsewhere on the image opens (as previously) the associated comment window.

This functionality is available only for Word documents.


Before these documents are locked in as policies, they must be researched to verify that they will be compliant with all federal, state, and local laws. Early state what is expected from employees and w

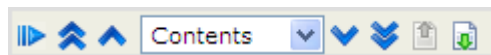
Image:




Note: there is a knowledge base article which examines in detail the behavior of images in Word documents and correspondingly in PleaseReview. This article is available via the PleaseReview FAQ database.

#### 4.4.6 Minimize View

Minimize icon  collapses the left hand navigation pane menu to increase the screen 'real estate' available to display the document. The toolbar reflects this as shown:




The left hand navigation pane can be reinstated by clicking on the  maximize icon.

#### 4.4.7 Reference Document - Open in a New Window

The document title for reference documents includes an icon which opens the document in a new window:



Clicking on the  icon opens the document in a new window. Clicking on the title itself opens the document in the same window.

### 4.5 Commenting, Comment Types and Behavior

#### 4.5.1 Document Type Behavior

**Word:** To make a comment simply click on the paragraph you wish to comment upon. The comment window will then open (see [The Comment Window/Pane](#)).

**Excel:** To make a comment simply click on the cell you wish to comment upon. The comment window will then open. See [Excel](#) for further information on reviewing Excel documents.

**Image:** To make a comment simply click on the image in the location where you want the comment to appear. The comment window will then open.

**PowerPoint:** PowerPoint slides are displayed as images and the image functionality applies. Slide notes are displayed as text and the Word functionality applies.

**PDF:** See [PDF](#).

**Plain Text:** To make a comment simply click on the line you wish to comment upon. The comment window will then open.

Plain text files will show proposed changes as mark-up in the document in a similar manner to Word documents – see above.

##### 4.5.1.1 Excel

Notes on reviewing Microsoft Excel documents:

- Proposed changes are supported on both formulae and text. As for Word documents, accepted proposed changes will, by default, update the Excel file on download unless the original spreadsheet is 2003 (.xls) format. In this instance accepted changes to formulae cells are shown in the downloaded document as comments;

- No attempt is made to validate proposed changes to formulae. If the revised formula is accepted in PleaseReview and is not correctly formed the downloaded Excel file will flag it as being invalid when opened;
- If a formula is updated the spreadsheet will not recalculate in the browser;
- Special rules apply to cells with reference formulae (i.e. where a cell formula has been created by dragging or copying the formula from another cell);
- Hidden columns and rows will be displayed but the contents will be replaced with the word 'hidden';
- Excel review does not support EditZones, ReviewZones or other such advanced options such as document comparison;
- If the enter key is used when entering data in a blank cell in the review, the data will have the 'Wrap Text' enabled automatically when the document is round tripped back into Excel. If appending data within the review to a cell that has data that is not 'Wrap Text' enabled and the enter key is used, the data will display on one line (inheriting the original format of the data) after round tripping.

#### **4.5.1.1.1 Excel Limitations and Functionality Not Supported**

Due to Excel's inherent complexity and HTML limitations, it is not possible to support all options and formatting. This section lists the major issues to be aware of:

- If a formulae is changed in PleaseReview it will only be recalculated in the downloaded Excel file once the Excel "enable editing" button (in the top yellow banner shown for all downloaded documents in Office) has been clicked. Otherwise, the spreadsheet will still show old values based on the changed formulae;
- In the PleaseReview comments window any value that uses symbols (e.g. £, \$) will not display the symbol, only the value. If making a proposed change there is no need to enter the symbol while in the comments window as once round tripped it will appear with the new value;
- If a user enters a date into a blank cell in PleaseReview, when round tripped into Excel, the format of this value will be 'General' and not a date format as it would if entered into Excel directly. Numbers also have a text value and appear left aligned;
- PleaseReview does not display charts or similar – the worksheet displays a warning message that there are items which cannot be displayed. Users can, however, enter data in the cells where the chart would normally be which, when round tripped, would be covered up by the chart;
- When making a proposed change to a date, the format used is the default date format from the server. Therefore it will ignore certain format rules in Excel;
- The handling of text wrapping in Excel is very different to HTML. Because of this there may be instances where text which is not wrapped in Excel is shown as wrapped when in the review and vice versa;



- The tooltips for formulae will only display the original formula uploaded. So if a user proposes a change to this and the change is accepted, the tooltip will not show the new value;
- Within Excel the Owner has the option to display a list of values for selection within the cell. This restricts the user to only being able to select from the list. This rule is not upheld in the review, and the user can enter any data which, when round tripped, will be accepted;
- Formatted text effects cannot be viewed in the PleaseReview display. However, the formatted effects are retained in the downloaded 'round tripped' spreadsheet. This affects the following formatting options:

Angled and vertical text  
 Center and right aligned 'overflow' text  
 Shrink to fit text  
 Cell fill effects  
 Font fill effects  
 Drop-down boxes – the selected item is displayed  
 Charts, text boxes and similar  
 Hyperlinks to other sheets  
 Protected sheets and cells – the protection is ignored.

- Comments that are in the original Excel document before being uploaded into PleaseReview are not displayed within the review;
- 
- Percentages are shown within cells: for example 10.0% in the formula bar is displayed as 10%, whilst in the comment window it is displayed as 0.1. If a proposed change is made to the figure it should be made using the 0.1 format in order to be round tripped correctly, otherwise it will be downloaded as an Excel comment;
- 
- Pivot tables are not always drawn correctly.

#### **4.5.1.2 PDF**

There are two options within PleaseReview for commenting on PDF files:

1. If the user has Acrobat Standard or Professional (i.e. not the free Adobe Reader) installed on their PC, it is possible to use a PleaseReview PDF plug-in;
2. If the user does not have the necessary Acrobat software or the plug-in, it is possible to make use of the 'PDF as image' capability.

The default option is defined by system policy and set by each user in their user settings.

There are two versions of the PDF plug-in which are supported by PleaseReview v4.1.x and later. You will need to check with your system administrator to find out which version of the plug-in your server is setup to use.

Note: if you are using a version of PleaseReview which is earlier than v4.1 then you can only use the v3 plug-in.

The v3 plug-in provides PleaseReview buttons on the Acrobat toolbar when you are in the review. The PleaseReview comment window is used for adding comments and proposing changes.



PleaseReview v4 plug-in: Provides access to the Acrobat toolbar so Acrobat comment and mark-up tools can be used, rather than the standard PleaseReview comment window.

#### **4.5.1.2.1 Acrobat Standard or Professional with PDF Plug-in v3**

Commenting on PDF documents using the PleaseReview v3 plug-in requires a full copy of Acrobat (i.e. Standard or Professional) as well as the v3 plug-in.

Note: the v3 plug-in is supported on Acrobat 5.x, 6.x, 7.x, 8.x and 9.x.


Once installed, the plug-in appears on the Acrobat toolbar:







Note: the toolbar may be collapsed. If collapsed only one of the tools will be showing.


If the PDF is text-based, the PleaseReview Text Select tool  can be used. To make a text-based comment, select this tool, click and drag the text upon which you wish to comment (can be from a single word up to many paragraphs) and release the mouse button. The comment window will then pop up.

If the PDF is not text-based or you want to comment on an arbitrary graphic

area, the PleaseReview Graphic Select tool  can be selected. To make a graphic-based comment, select this tool, click and drag the graphic rectangle on which you wish to comment (this may also include text) and release the mouse button. The comment box will then pop up.

A general comment can also be created using the  tool.

Note: with PDFs there is a slight difference in display between the  icon on the main toolbar and the  tool on the PDF-specific toolbar. The  icon on the main toolbar will display all comments on the PDF, whilst the  tool on the PDF-specific toolbar, will just display the general comments.

The final tool is 'refresh' . This refreshes the data on the PDF file. This is a 'data only' refresh and does not re-load the PDF file itself.

Comments are added under a top-level Acrobat bookmark 'Comments'. Any existing bookmarks can be found under the top-level bookmark 'Contents'.

#### **4.5.1.2.2 Acrobat Standard or Professional with PDF Plug-in v4**

Commenting on PDF documents using the PleaseReview v4 plug-in requires a full copy of Acrobat (i.e. Standard or Professional) as well as the v4 plug-in.

Note: the v4 plug-in is supported on Acrobat 7.x, 8.x and 9.x. The tools available depend on the version of Acrobat installed on the individual machine. The following screenshots are taken using Acrobat 9.

Once installed, the plug-in enables the Acrobat comment and mark-up toolbar (this may need to be selected with a right click on the Acrobat toolbar):



Simply click on any of the tools required, inserting a comment or mark-up as if using Acrobat outside of PleaseReview:

LA regulations require control reagents to be used according to 42 CFR 493. If bloodborne pathogen test kit uses any of its manufacturer supplied reagents to serve as a calibrator function, *i.e.*, either or both of the test kit controls (negative or positive) calculate the assay cutoff, then CLIA regulations require that (an) additional control reagent(s) be included in each run (see table below). Such reagents may be procured or developed in-house. In any case, prior to placing the additional controls in routine use, each lot of such reagents should have: 1) a known dating period, *i.e.*, established stability (supplied by a control reagent manufacturer or established by the user on in-house developed control reagents) known performance parameters, *i.e.*, specifications for acceptance. Prior to implementing additional control reagents should be qualified, *i.e.*, evaluated for suitability by the generally accepted laboratory quality control procedures to establish acceptance/criteria, to minimize possible incompatibilities that may exist with particular test kit putting control reagents into use.

**TEST KIT REAGENT(S)**      **USED IN CALCULATION OF THE CUTOFF?**      **ADDITIONAL CONTROL REAGENT REQUIRED**

Negative Control	Yes	Yes (Negative Control)
Negative Control	No	No
Positive Control	Yes	Yes (Positive Control)
Positive Control	No	No
Positive and Negative Control	Yes	Yes (Positive and Negative Controls)

This is the callout tool


**Sticky Note** 03/02/2011 11:12:41  
Sue  
This is an acrobat sticky note

**Replacement Text** 03/02/2011 11:14:18  
Sue  
This is replacement text

Note: there may be some Acrobat tools or options available which are not supported or which the user does not have permission to use in PleaseReview. If such a tool is selected, a pop-up warning will be displayed.

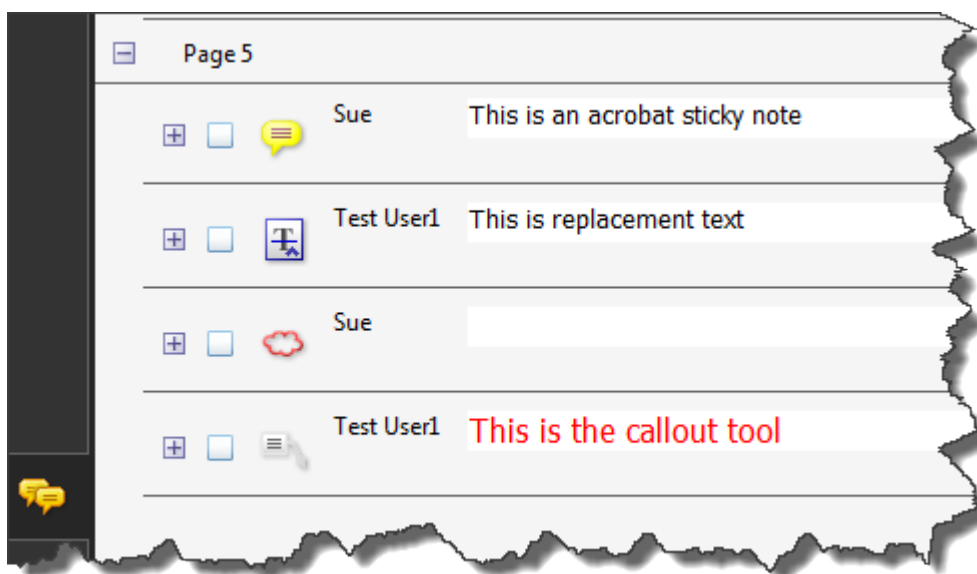
Comments or mark-up which have been applied to the document are not seen by other participants until the review has been synced with the PleaseReview server. The auto-refresh option (if available) will automatically update the document to show all review participants' latest comments and changes. This happens at a specified time interval (default 60 seconds). You can check if 'automatic refresh' is active by clicking on the 'Settings' option on the main PleaseReview toolbar .

Alternatively, a manual sync can be performed by clicking on the 'PleaseTech

Sync' button on the Acrobat toolbar: . The manual sync is usually completed in just a few seconds, if there are numerous comments it may take longer. The sync button will remain depressed until the sync is complete.

Note: if a comment or mark-up is in 'edit-mode' (*i.e.* being added or updated) when an automatic sync takes place it will not be saved to the server until the next sync takes place.

All comments and mark-up will be listed in the Acrobat comment pane:




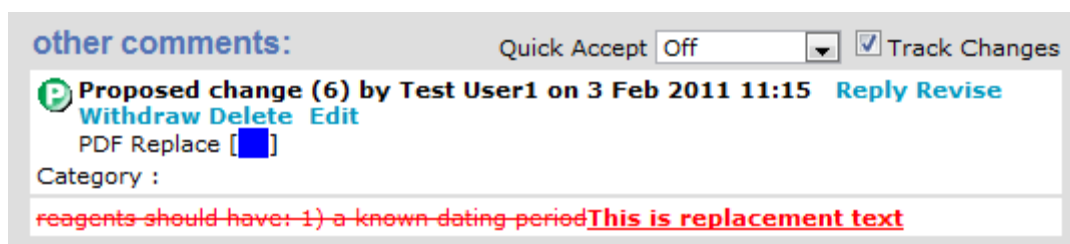
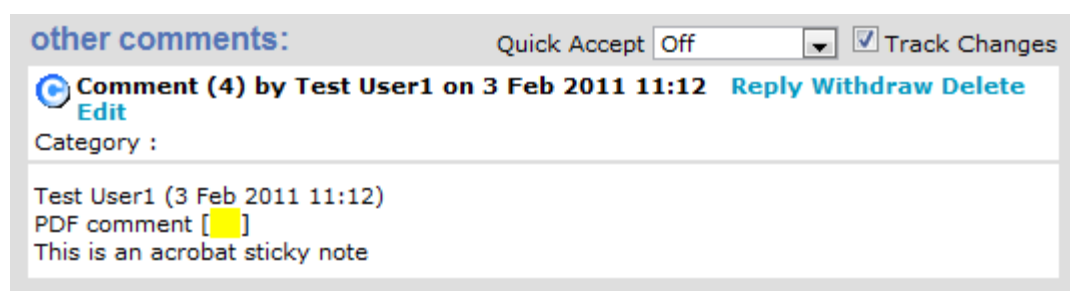
Note: any replies to comments or mark-up are not shown in the sticky-note pop-up window but will be visible in the Acrobat comment pane.

Whilst the v4 plug-in mostly negates the use of the PleaseReview comment window, there remain two instances when it may be required:

- If you wish to apply a comment category;
- If an Author wishes to re-open a closed or accepted comment.

Note: depending on the Acrobat tool used, the comment window will either display a comment or a proposed change.


To open the comment window, select the comment or mark-up then click on the 'Open comments window' button on the Acrobat toolbar: .



#### **4.5.1.2.3 PDF as Image**

PleaseReview has an in-built capability to convert PDF files into images. This allows users who only have the free Adobe Reader to comment on PDF files. The user needs to select 'Review as images' under user settings, see [User Settings](#).

PDF files will be presented in the browser as an image and the PleaseReview image commenting capability is available. Please see [Document Type Behavior](#) for the functionality available.

Please remember that it is possible to open the original PDF from the document download icon () on the toolbar. This will open an original copy of the PDF document. So if, for example, small text is indistinct in the image, the original PDF can be opened from the download document icon, the detail viewed in the PDF and then comments can be made on the image.

Notes:

- Only comments are available to participants using the image commenting functionality;
- There is no zoom capability other than that provided by the browser;
- Any PDF comments which existed on the uploaded PDF will not be shown on the image but will, of course, be available if the PDF is opened from the download icon.

#### **4.5.1.2.4 Using the v4 plug-in in 'offline' mode**

It is possible to use the v4 PDF plug-in in 'offline' mode. This means you are able to mark-up the PDF file using standard Acrobat annotations and drawing objects and then subsequently upload these comments and changes to the server.

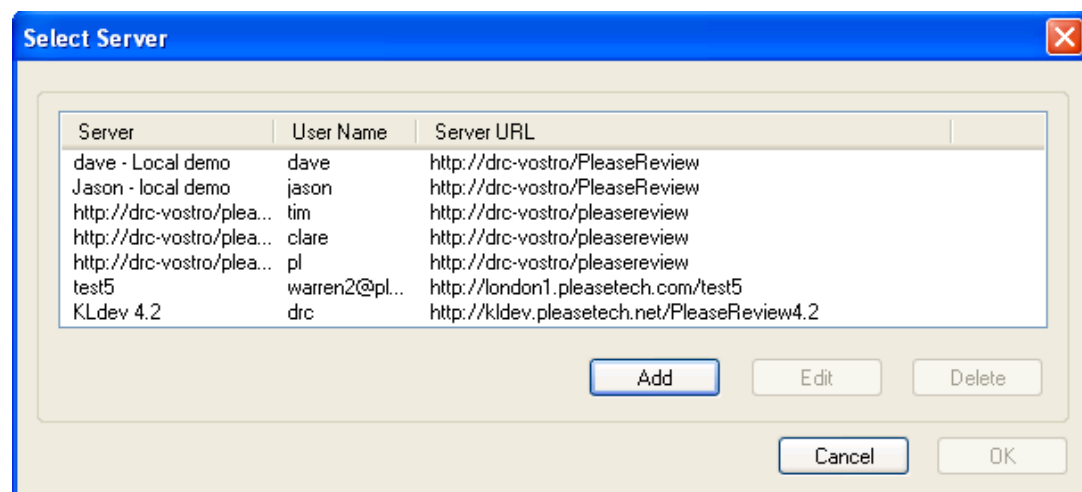
Points to note:

- The Reviewer must be a participant in the review;
- An original copy of the PDF file must be used. If a copy of the PDF file is downloaded from the review it must be downloaded from the 'download copy' link on the review control panel and the 'include comments' option must not be selected;
- Alternatively the original copy could be obtained from email, a shared drive, etc. The origin of the copy is unimportant, as long as it is not the copy of the PDF file displayed in the review browser or a copy with comments and changes already added through PleaseReview;
- It is possible to upload comments and changes in phases. Previously uploaded comments and changes will not be uploaded again. However, any edits to these previously uploaded comments and changes will not be recognized or uploaded. In this case, to ensure the upload of an 'edited' component, the original should be deleted and it should be re-created;
- The plug-in is integrated with the common user credentials file for other PleaseTech client tools. Therefore if these are installed it will automatically pick-up the same user credentials.

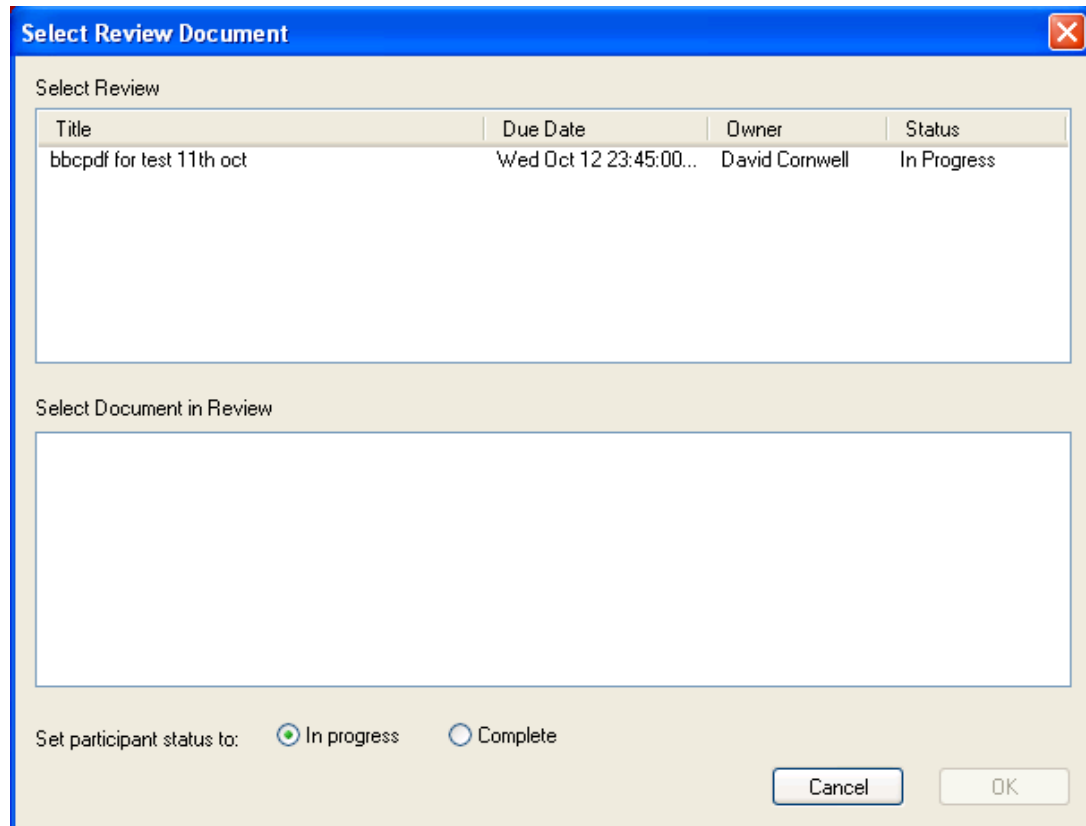
In the PDF environment the PleaseReview 'upload comments' option will be displayed as shown below:



Once the upload button has been selected the user is presented with a server selection screen as shown below. From this screen additional servers may be added (which will add them to the common user credentials file). If there is only one server available it will be pre-selected. If there are multiple servers available, the server will need to be selected.



Next, the participant is presented with the review selection. The reviews in which the reviewer is a participant and which are currently open (i.e. in progress or overdue) are listed in the top panel.



Select Review Document

Select Review

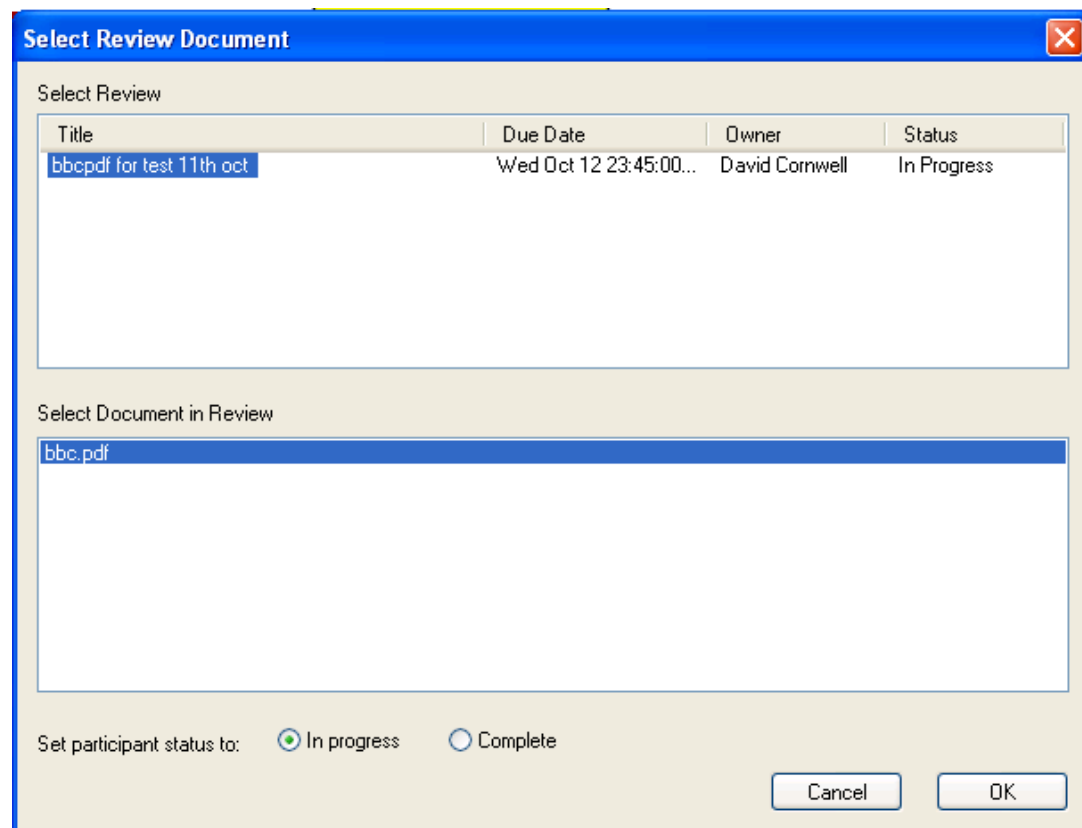
Title	Due Date	Owner	Status
bbcpdf for test 11th oct	Wed Oct 12 23:45:00...	David Cornwell	In Progress

Select Document in Review

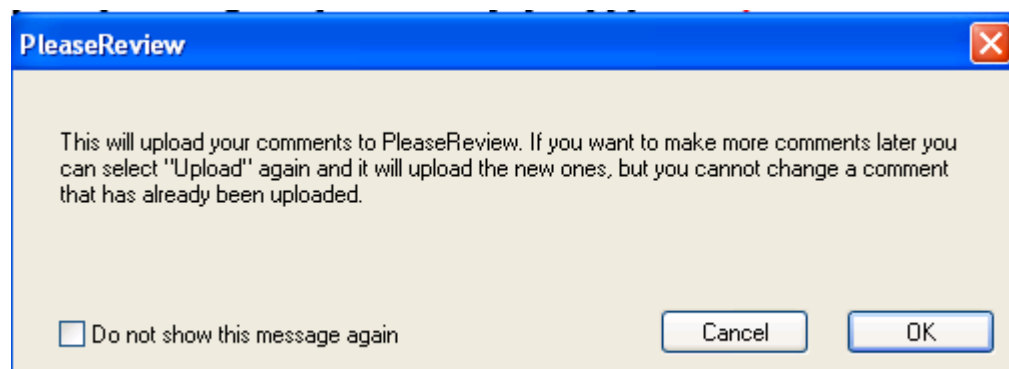
Set participant status to: ☒ In progress ☐ Complete

Cancel OK

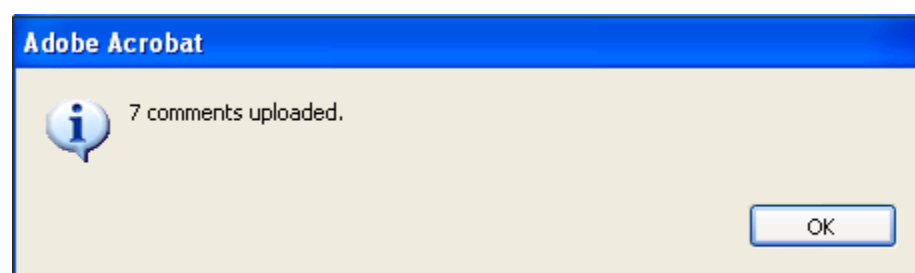
Once the review has been selected the PDF documents in that review will be displayed in the bottom pane. The example shown below shows only one PDF file in the review. Any others would be listed. The reviewer is also able to set their review status using the radio buttons as shown below:



Once the document is selected and the user clicks 'OK' an optional reminder (shown below) is displayed and the upload commences.



Finally the upload is confirmed as shown below:



In the event the upload fails an error message will be provided and, if appropriate, a further attempt should be made to upload the comments and

changes. However, if for example, the review has been closed or completed the PDF file will still contain the comments and changes and a copy of this may be passed to the review Owner by other means.

#### **4.5.1.2.5 Mixed Environments**

It is possible for participants on the same review to use different PDF commenting methods.

Participants using the 'PDF as image' option will see comments and changes made by participants using the PDF plug-in shown on the image in the correct location with the appropriate icon.

Participants using the PDF plug-in will see comments made on the image of the PDF in the correct location.

#### **4.5.2 Document Shading**

If parts of the document are shaded, this indicates that an EditZone is present. This is described under the 'EditZones' (Reviewer) section below.

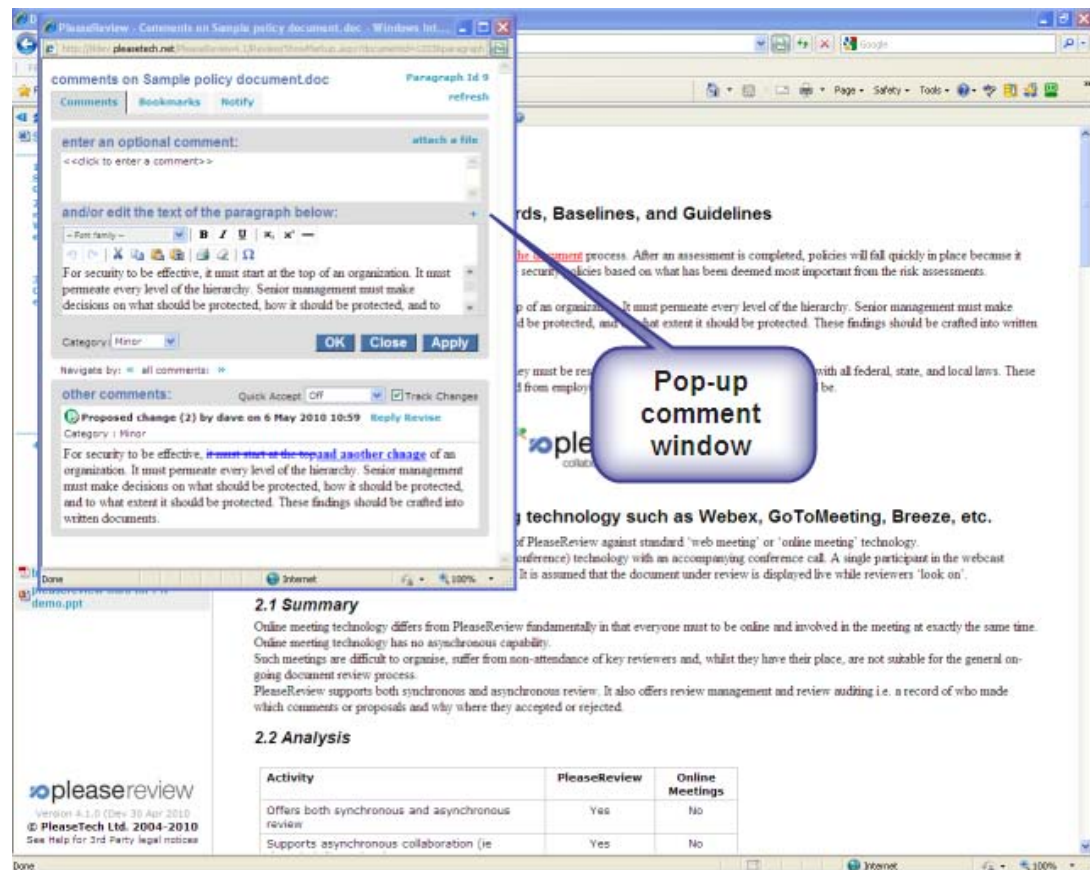
#### **4.5.3 The Comment Window/Pane**

All comments are recorded in the comment window/pane.

The default comment window/pane is a self-contained, pop-up window which contains all comments associated with the comment location (i.e. paragraph in Word, location in images, or text/graphic selection in PDFs). It may be displayed as a pane on the right or left of the document depending on user preferences.

The comment window as a pop-up:





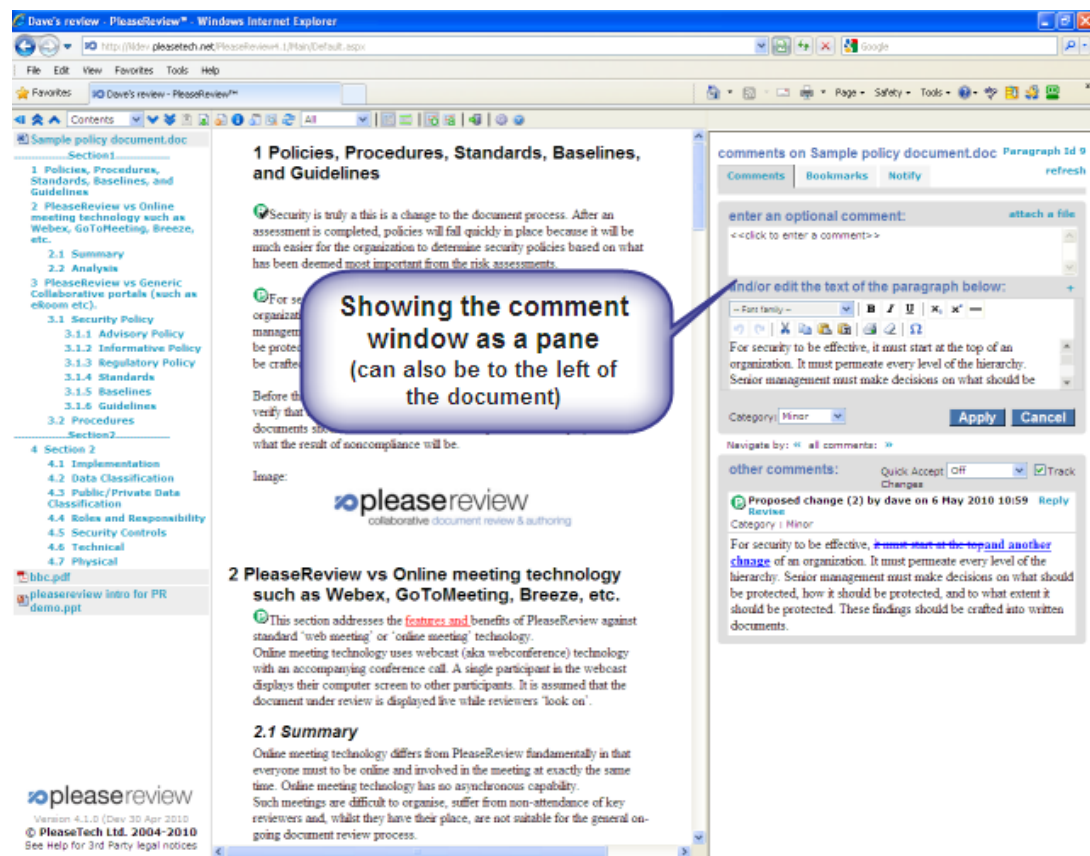
#### 4.5.3.1 The Comment Pane

The comment window may be displayed as an additional pane as shown below.

The use of the comment pane instead of the pop-up comment window is a user preference in user settings. The 'pop-up' is the default.

Notes:

- The comment pane may be displayed on the right of the document (as shown below) or the left of the document. Note: the left hand navigation pane may be minimized;
- The comment pane acts in exactly the same way as the pop-up comment window with the exception of the 'Apply' button which applies the comment or proposed change, whilst the 'Cancel' button cancels any edits or comments by refreshing the pane.
- The 'Apply' button applies the comment or proposed change, whilst the 'Cancel' button cancels any edits or comments by refreshing the pane.



#### 4.5.4 The Comment Window/Pane Detail

The comment window is shown below:

comments on Sample policy document.doc Paragraph Id 1.5

Comments
Bookmarks
Zones
Notify
refresh

enter an optional comment:
attach a file

<<click to enter a comment>>

and/or edit the text of the paragraph below:
+

Font family
B
I
U
x<sub>2</sub>
x<sup>2</sup>
—

↶
↷
✂
📄
📁
📧
🔗
Ω

For security to be effective, it must start at the top of an organization. It must permeate every level of the hierarchy. Senior management must make decisions on what should be protected, how it should be protected, and to what extent it should be protected. These findings should be crafted into written documents.

Category: Minor
OK
Close
Apply

Navigate by: << all comments: >>

other comments:
Quick Accept Off
☒ Track Changes

**P** Proposed change (1) by Sue on 28 Sep 2011 14:35 Reply Accept  
Revise Close Withdraw Delete Edit  
Category : Minor

For security to be effective, ~~it must start at the top of~~ **this is another change** an organization. It must permeate every level of the hierarchy. Senior management must make decisions on what should be protected, how it should be protected, and to what extent it should be protected. These findings should be crafted into written documents.

Existing comments on the paragraph/location are shown in the area entitled 'other comments'.

## Type Description

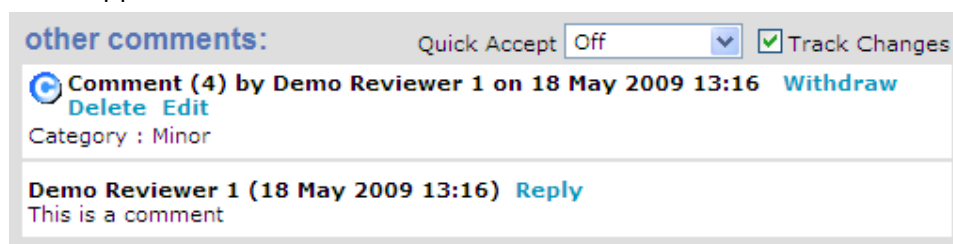
**Comments** These are comments on a paragraph or item (i.e. graphic). For those familiar with Microsoft Word, PleaseReview comments translate directly into Microsoft Word comments.

Comments are entered in the box entitled 'enter an optional comment', see below:

enter an optional comment:
attach a file

<<click to enter a comment>>

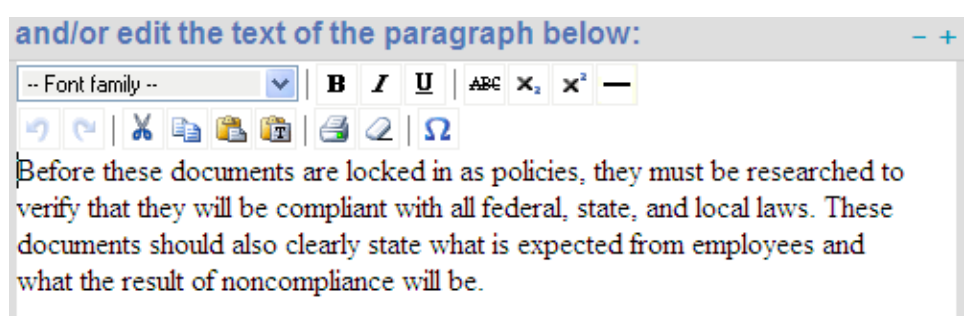
Once applied, the comment will be shown as follows:



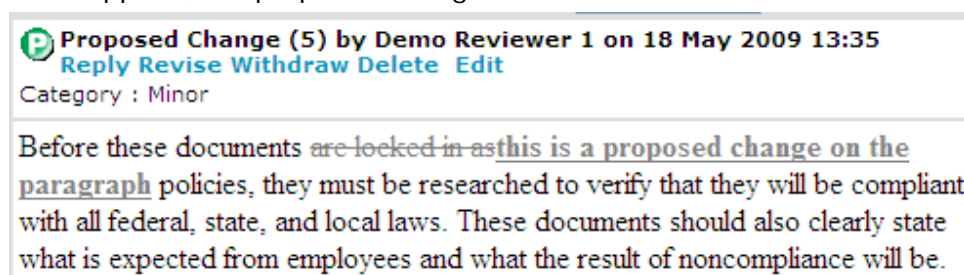
Proposed  
Changes

These are proposed changes to the wording of a paragraph. A comment regarding the proposed change can be added if required.

To create a proposed change, the text of the paragraph is edited within the text box below the comment box, see below:



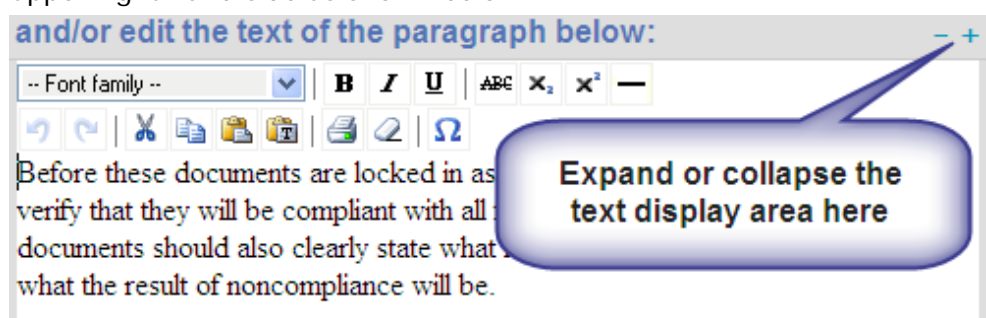
Once applied, the proposed change will be shown as follows:



Note: if the text is edited or formatted, the edit will be treated as a proposed change, any associated comment will be treated as a comment associated with the proposed change.

To create a comment only, do not edit the text.

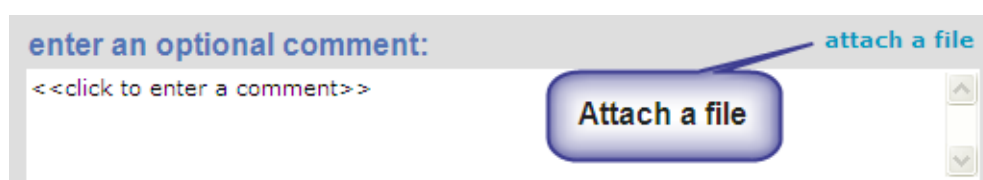
If the paragraph is bigger than the display area, it is possible to expand or reduce the size of the display area using the '-' & '+' options located on the upper right hand side as shown below:



Note: it is possible for the review Owner to disable the ability to apply proposed changes to a document and thus the only option will be to add a comment.

**Attach a file** A file may be attached to a comment or proposed change, or the entire comment may be the attached file – there is no need to enter any textual comments or edit the paragraph to attach a file.

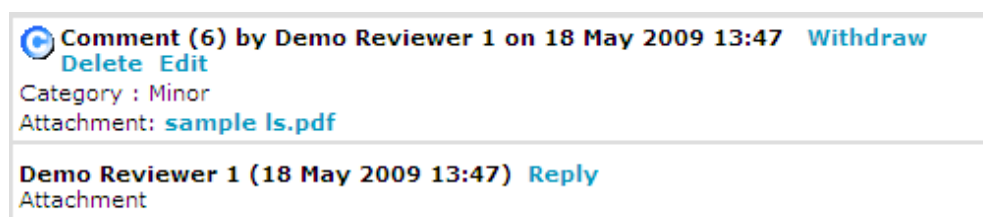
Selecting the 'attach a file' option:




This will open a browse option:



Select the file and then use the standard 'OK' or 'Apply' options to create the comment which appears in the same way as a standard comment:



Comments with attachments (with or without any comment text) behave as any other comment.


**General Comments** It is also possible to add a general comment to a document using the  toolbar icon.

For text-based documents, a comment or proposed change can be made. For non text-based documents, the paragraph text box will contain the words 'no paragraph text available' (i.e. proposed changes cannot be made).

Note: within the comment window, the 'OK' button will apply the comment/ proposed change and close the comment window, whilst the 'Apply' button will apply the comment/ proposed change but leave the comment window open. The 'Close' button will cancel the action and close the window.

When a comment has been added there is the option to 'Edit', 'Withdraw' or 'Delete' the comment/proposed change, see below:

**other comments:** Quick Accept  ☒ Track Changes

 **Comment (4) by Demo Reviewer 1 on 18 May 2009 13:16** [Withdraw](#)  
[Delete](#) [Edit](#)  
 Category : Minor

---

**Demo Reviewer 1 (18 May 2009 13:16)** [Reply](#)  
 This is a comment

Notes:

































- Only the participant who made the comment has the option to edit or delete it, and can only do so if no-one has replied to it and it is open (i.e. not 'Accepted' or 'Closed' by an Author);
- Only the person who made the comment has the option to withdraw it and may do so at any time if it is open;

For example, if one reviewer makes a comment and another reviewer replies with a message which causes the original reviewer to re-consider the comment, it is not possible for the original reviewer to delete or edit the comment (because of the reply). So the only option is to 'Withdraw' the comment which will effectively close it.

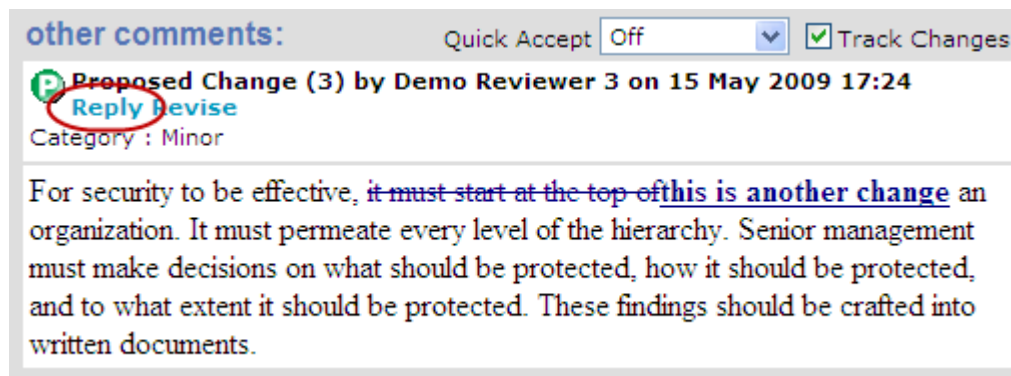
- Another participant's proposed change may be revised using the 'Revise' link.

**and/or edit the text of the paragraph below:** - +

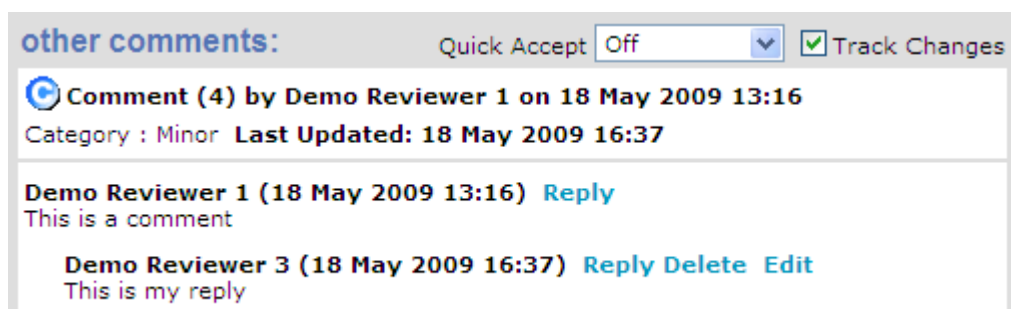
-- Font family --  **B** *I* U ABC x<sub>2</sub> x<sup>2</sup> —

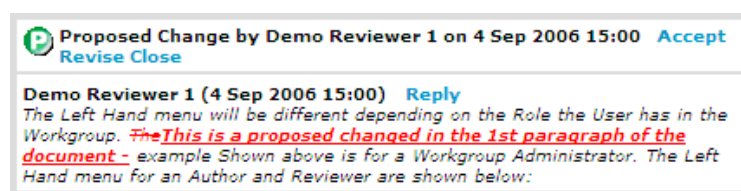




Your reply will be displayed as a discussion thread.

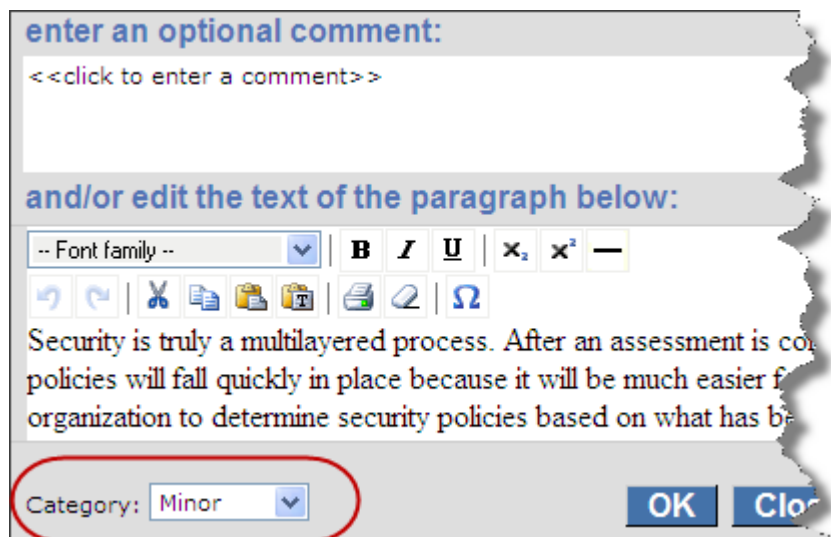


- Accepted comments and closed/withdrawn comments have different icons;
- Once 'Accepted', 'Closed' or 'Withdrawn', no further discussion of a comment, etc. is possible. Thus it is no longer possible to 'Reply' to it;
- Proposed changes are presented in colored text with deleted text ~~struck through~~ and inserted text underlined. The color of the text will reflect the individual participant.



#### 4.5.4.1 Comment Categorization

If enabled, Reviewers may categorize a comment or proposed change. This is achieved by selecting the comment category from the drop-down box as shown below:



Note: Comment categories are system configurable and therefore the list displayed may be specific to your system.

#### 4.5.4.2 Paragraph ID

At the top right of the comment window is the 'Paragraph Id'.

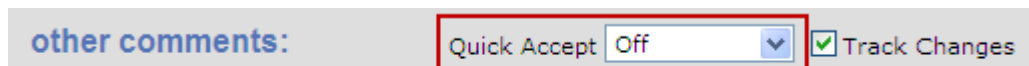


This is a link. Clicking on the link will scroll the document to the location of the paragraph.

This is useful when considering making a comment or proposed change to a paragraph, but want to check something elsewhere in the document first. By clicking on the paragraph of interest the comment window opens and the document can be scrolled and read as appropriate. Then using the comment window, clicking on the 'Paragraph Id' will return the user to the original location.

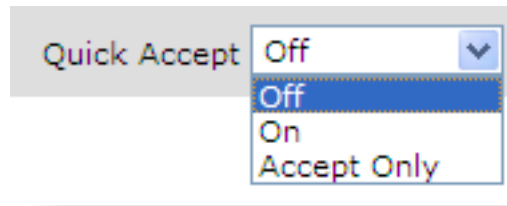
#### 4.5.4.3 QuickAccept

Adjacent to the 'other comments' title is 'QuickAccept':



If available, QuickAccept is mainly an Author setting. However, it is relevant for Reviewers when withdrawing a comment or proposed change. The available settings are shown below and the QuickAccept default setting may be configured under the user's personal settings:



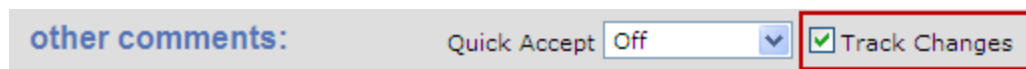


If QuickAccept is set to 'Off' or to 'Accept only' (or doesn't appear at all because it is disabled at system policy level) the Reviewer will be prompted for a reason for withdrawing a comment or proposed change.

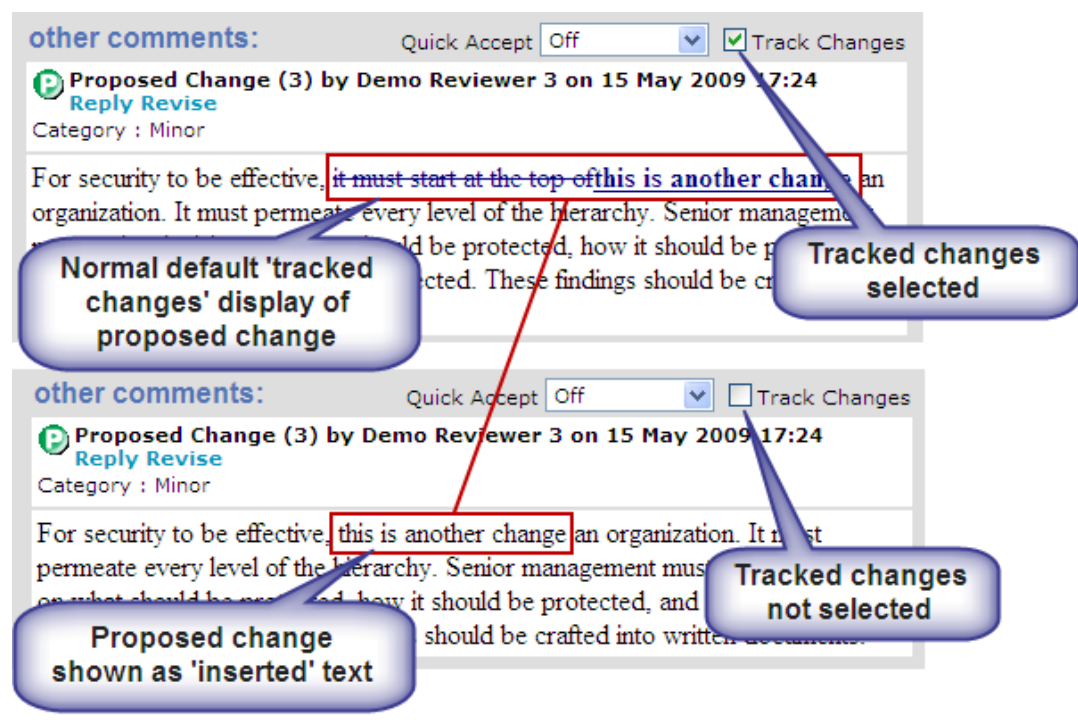
If QuickAccept is set to 'On' then the Reviewer will not be prompted for a reason for withdrawing a comment or proposed change.

#### 4.5.4.4 Track Changes

Adjacent to QuickAccept is 'Track Changes':

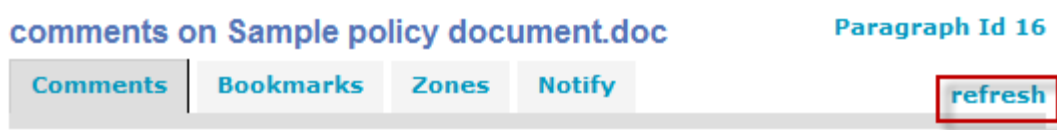


When unchecked, 'tracked changes' are removed within the text of proposed changes – see below:



#### 4.5.4.5 Refresh Comment Window

At the top right of the comment window below the paragraph ID is a 'refresh' link.

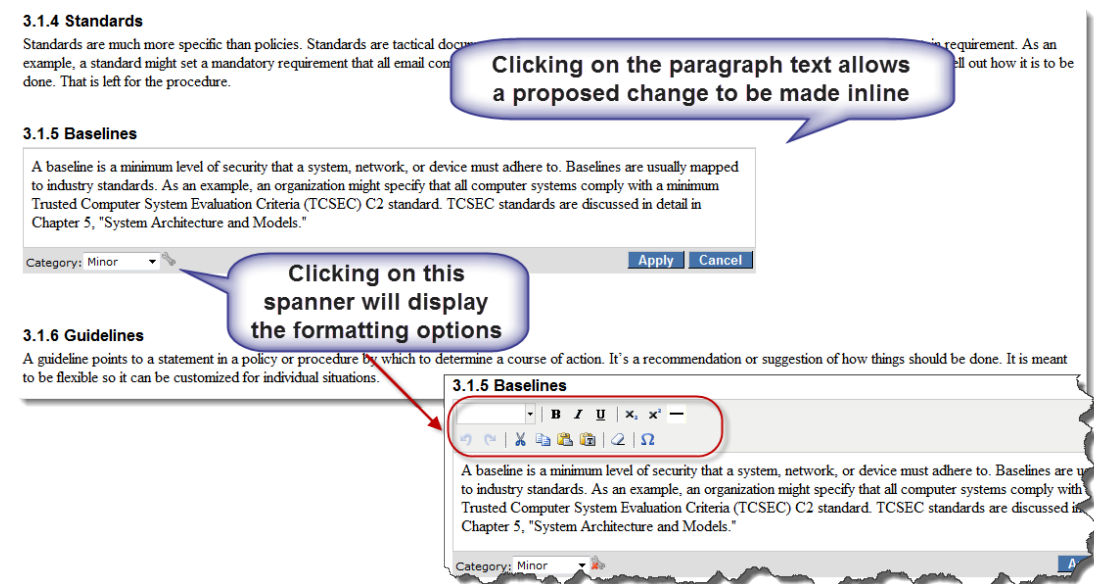


This refreshes the comment window only (not the entire document), and adds any additional changes for the paragraph/location since the comment window was opened.

#### 4.5.5 Inline Editing and Paragraph Toolbar

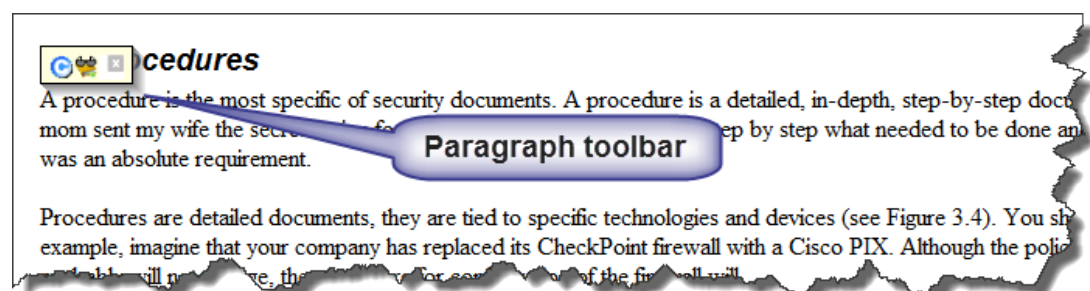
Inline editing, if enabled, allows the user to edit a paragraph directly in the document rather than in the pop-up comment window or in the comment pane.

When the user clicks on a paragraph, an edit area opens inline in the document, see below. Editing the text will create a standard proposed change. Inline editing is a user preference which must be selected in the 'user settings' window.



Once the proposed change has been completed, a category can be selected if required. Clicking Apply will update the document, displaying a 'P' icon and the mark-up.

When inline editing is selected the user is provided with a paragraph toolbar which appears when the mouse is hovered over the paragraph text:



Clicking on the 'C' icon will open the pop-up comment window or pane (depending on user settings) allowing comments to be made in the normal way.

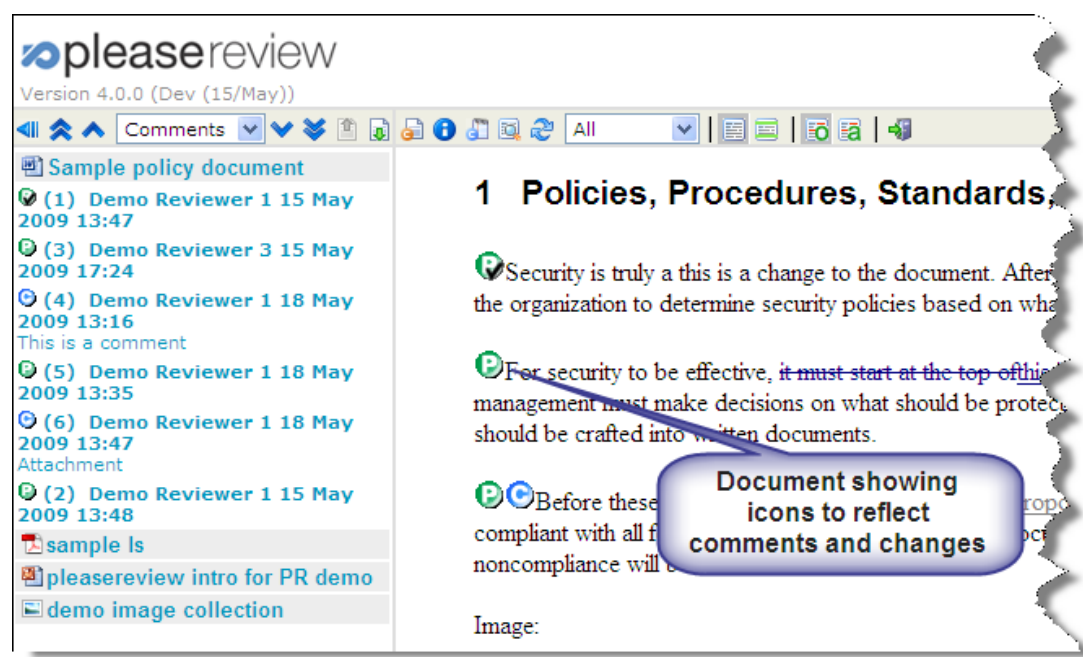
Clicking on the private bookmark icon will immediately insert a private bookmark against the paragraph. To make a public bookmark click on the 'C' icon to access the bookmark tab from the comment window.

Under user settings it is possible to select 'Toolbar only', in which case the paragraph toolbar just displays the bookmark icon allowing a bookmark to be applied with a single click. Clicking on the paragraph text will open the comment window/pane so that comments and changes can be made in the usual way.

#### 4.6 Document Mark-up and Icons






Once comments have been made, they are attached to the appropriate paragraph/location and are instantly available to other Reviewers. So if another Reviewer clicks on the paragraph/location immediately after, they will see the comment, regardless of whether there is mark-up shown on the document.

Clicking 'Refresh' updates the document being viewed to show the comments from other Reviewers on the document and in the navigation pane (note: as per the paragraph above this is a visual indicator only). See also [Refreshing the Document \(Auto-Refresh\)](#).

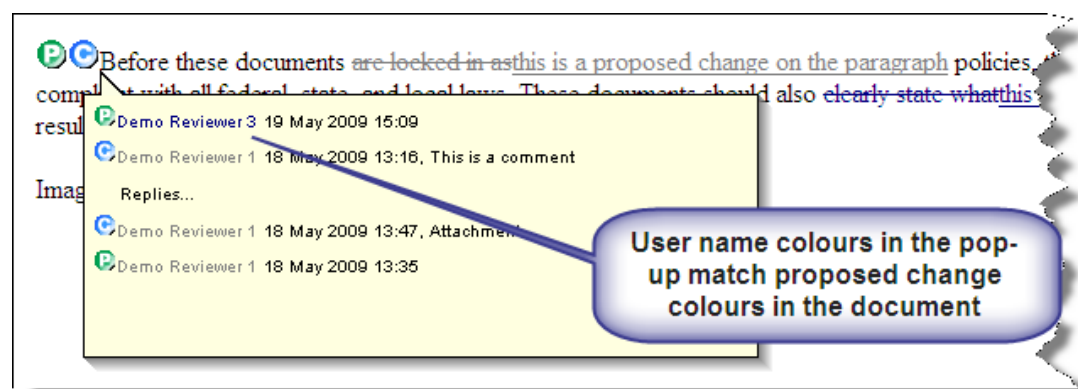


#### Icon Type



#### Description

	The comment/proposed change is 'Open' (i.e. an Author has not accepted or closed the comment).
	The paragraph has a conflicting proposed change (Word & Excel only). Only the latest proposed change is shown on the screen.
	The comment/proposed change is 'Accepted' (i.e. an Author has accepted the comment).
	The comment/proposed change is 'Closed' (i.e. an Author has closed the comment), or 'Withdrawn' (i.e. the comment author has withdrawn it).
	If the document contains a general comment, one of these icons, representing the status of the general comment, is placed at the top centre of the document.

'Mousing over' a comment or proposed change icon will display a box with more details:



Notes:

- Each paragraph/location may have multiple comments and changes of different types but will not have multiple icon states displayed. Only one icon of each type (i.e. , ) will be displayed with the displayed icon being the most relevant. For example, if a paragraph has accepted, open and closed comments on it, only the icon for the accepted comment will be displayed;
- Clicking on the icon will open the comment window for the appropriate paragraph/location;
- Clicking on the comment in the navigation pane will scroll the document to the comment and open the comment window for the appropriate paragraph/location;
- With images, the icon will appear over the image. The icon may obscure the image and, therefore, the icons can be hidden using the 'hide icons' button at the top of the page.



The operation of this button is as follows:

- 'Mouse over' the button (place the cursor over the button) to hide the icons;
- Click the button to turn the icons off. The button will show:



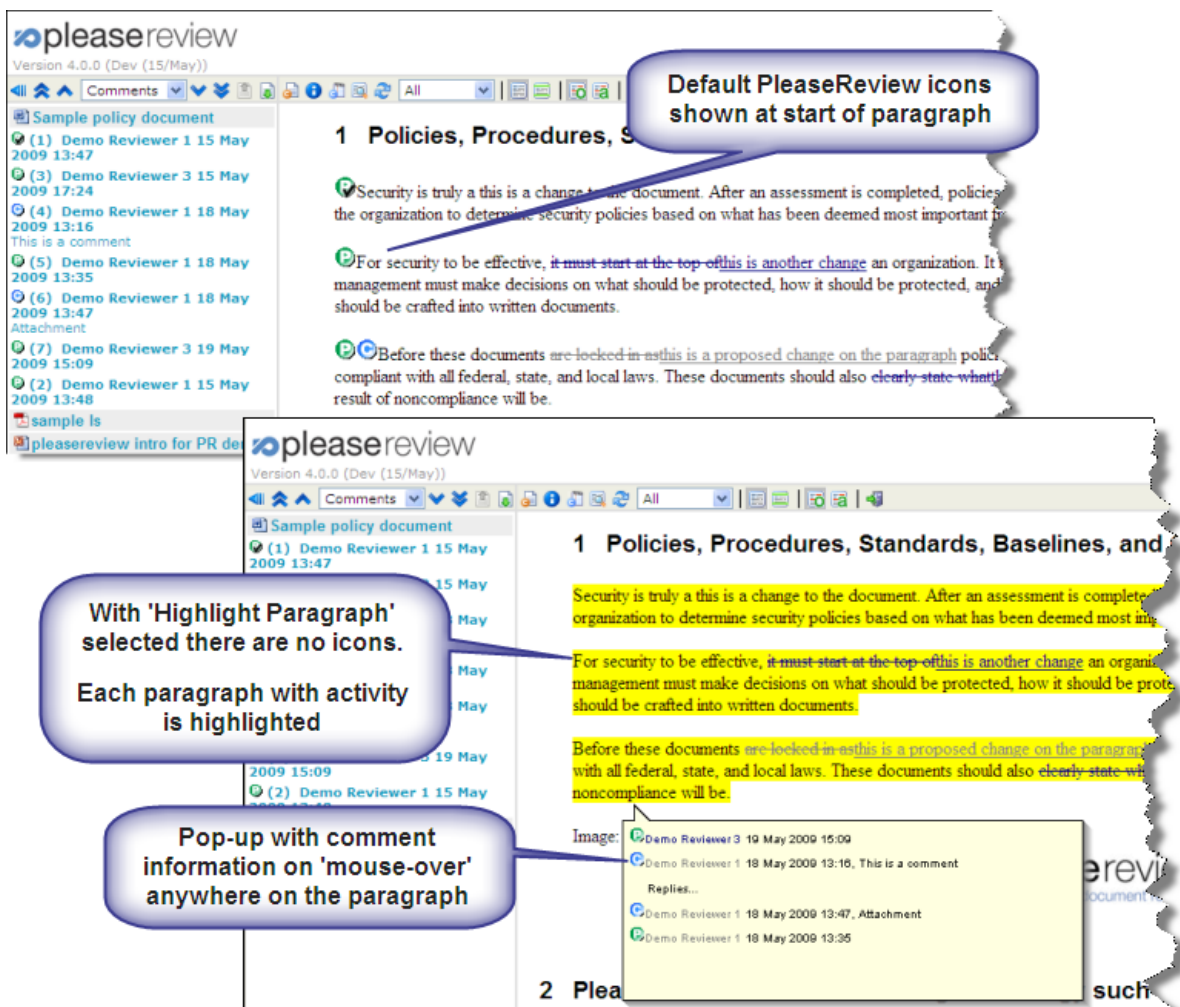
- With the icons turned off, 'mouse over' the button to show the icons;
- Click the button to turn the icons on – this is the default state described above;
- Different Reviewers' proposed changes are shown in different colors for ease of identification. The colors are shown in both the comment pane and the pop-up information box that appears when the icon is 'moused-

over'. They are reflected throughout the document and comments, and are consistent throughout the review. If using inline editing the toolbar will expand and display this pop-up box after a system configurable delay;

- The same Reviewer is likely to have different colors allocated in different reviews due to the way the color allocation is managed;
- It should be noted that the colors allocated to Reviewers by PleaseReview are **not** reflected in any downloaded Word document.

#### 4.6.1 Highlighting Paragraphs

For Word, Excel and text documents only, instead of identifying paragraphs with comments and proposed changes using the standard icons, there is the option of identifying such paragraphs by highlighting them. The primary purpose of this is to prevent the icons 'messing up' the formatting of items such as tables, etc.



Notes:


- The paragraph is simply highlighted to indicate activity. The highlight is the same color (yellow) regardless of the type of comment, or the status of the comment except where there is a conflicting proposed change in which case the paragraph is highlighted in red;
- The 'general comment' icon is not replaced and remains to indicate a general comment on the document;

- The 'mouse-over' pop-up (which in the 'icon' view pops up if the icon is 'moused over') is displayed after a delay (system configurable) when the paragraph itself is 'moused over'.

#### **4.7 Document Comparison and Review Linking**


PleaseReview provides the ability for document comparison between either documents in the same review, or documents in different reviews.

##### **4.7.1 Document Comparison**

Clicking the  icon on the toolbar opens a separate window which displays differences between the documents as 'Tracked Changes'.

The differences may be between:

1. Documents in the same review (in which case there will be two Word documents in the review with the comparison document being a 'Reference' document), or;
2. Documents in a 'linked' review (see below).

Note: The document linking icon () indicates that the document comparison is provided via a link to another review. Thus, the comparison is between documents in the current review and documents in the linked review (typically a review of a previous version of the document set). See [Creating a Review](#) for more details on review options.

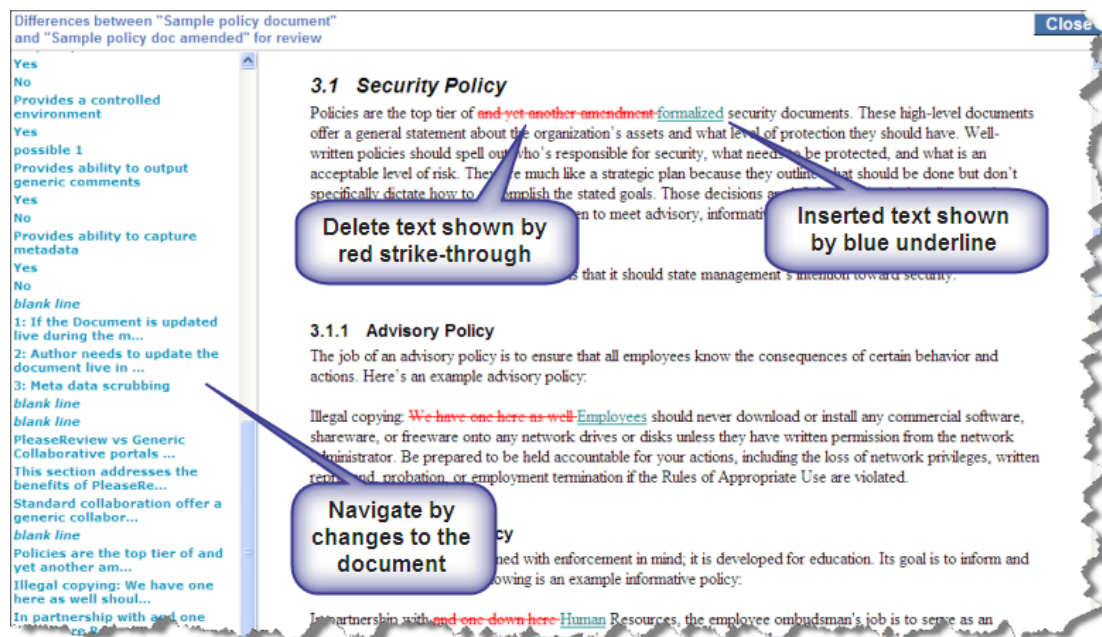
The paragraphs with differences are identified in the left hand navigation pane which allows users to navigate rapidly through each of the differences (see below).

Text shown in red with strike-through (~~like this~~) is present in the comparison document (i.e. the reference document in the review or the document in the linked review) but not in the document currently under review.


Text shown with a blue underline is present in the document currently under review but not in the comparison document.

Clicking on the paragraph identifier in the left hand navigation pane scrolls the document (in the right hand pane) to the paragraph location.







Notes:


- Comparison is available for Word documents only;
- Comparison must be enabled by the review Owner during review set-up. There is more detail on this in the 'Creating a Review' section;
- The changes in the TOC (table of contents) are not included in the listing of changes in the navigation pane on the left;
- If there is no  icon on the toolbar, document comparison is not available.

#### 4.7.2 Review Linking

If the review is linked to another (typically a review of a previous version of the document set), there will be a link icon () in the toolbar.

Clicking the link icon will open the linked review in a new window. The full functionality of that review is available. (Note: if the Reviewer does not have permissions on the linked review (i.e. is not a Reviewer) they will still be able to see the document comparison by clicking on the  icon but will not see the linked review represented by the .

Notes:

- Linking must be enabled by the review Owner during review set-up. There is more detail on this in the 'Creating a Review' section;
- If there is no  icon on the toolbar, the review is not linked.

#### 4.8 Refreshing the Document (Auto-Refresh)

As previously noted, comments are applied to a paragraph as soon as the 'OK' or 'Apply' button has been clicked. However, in order to view the changes in the browser and to update the document icons and comment navigation, 'Refresh' is available.

The manual refresh icon on the toolbar (see above) will reload the entire document. If it is a large document this may take some time.

The auto-refresh option (if available) will automatically update the document to show the latest comments and changes (both the user and other reviewers') without reloading the whole document. This happens every time a comment is made or updated, and also at a specified time interval.

## user settings

user settings for Sue

**daily digest**

☐ Send me a daily digest email

**review preferences**

<b>Automatic refresh</b>	<input checked="" type="checkbox"/> 60 Interval in second(s)
<b>Quick Accept</b>	Off
<b>Highlight Paragraph</b>	<input type="checkbox"/>
<b>Location of comments panel</b>	Pop up
<b>Default view</b>	Normal View
<b>Show tracked changes in document view</b>	Show open changes as tracked
<b>Default navigation</b>	Contents
<b>PDF review</b>	<input checked="" type="radio"/> Use Acrobat plug-in <input type="radio"/> Review as images
<b>Inline editing and Paragraph Toolbar settings</b>	Use Inline Editing

Apply

If the box is checked the document will auto-refresh. The default interval (specified by the system policy) is the minimum interval. Therefore the interval can be made longer but not shorter.

## 4.9 Bookmarks and Personal Notes

PleaseReview supports private and public bookmarks and personal notes, collectively called 'Bookmarks'.

Participants can have a single bookmark per paragraph. This bookmark may contain personal notes (which may be converted to a comment) and be made into a public bookmark.

To create a bookmark select the paragraph by clicking on it and the comment window will open. If browsing by bookmarks, the 'Bookmarks' tab will be at the front. If not, it will need to be selected.



bookmarks on Sample policy document.doc
Paragraph Id 98

Comments
Bookmarks
Zones
Notify

title

A procedure is the most specific of security doc

☐ Make Public

notes

Personal notes here

Make public

OK
Close
Apply

Navigate by: << bookmarks >>

bookmarks on this paragraph:

The title will be pre-filled with the first 45 characters of the selected paragraph. The title can be over-typed if required.

Notes may be added. The 'OK' and 'Apply' options work the same as in the Comments tab.

Once applied, the bookmark will be displayed in the lower section of the window under 'bookmarks on this paragraph'.

bookmarks on this paragraph:

My Private bookmark by Demo Reviewer 1
Delete
Edit
Convert to comment

Any additional bookmarks from other participants will also be shown.

bookmarks on this paragraph:

DR4's public bookmark by Demo Reviewer 4

and these are the notes associated with DR4's public bookmark

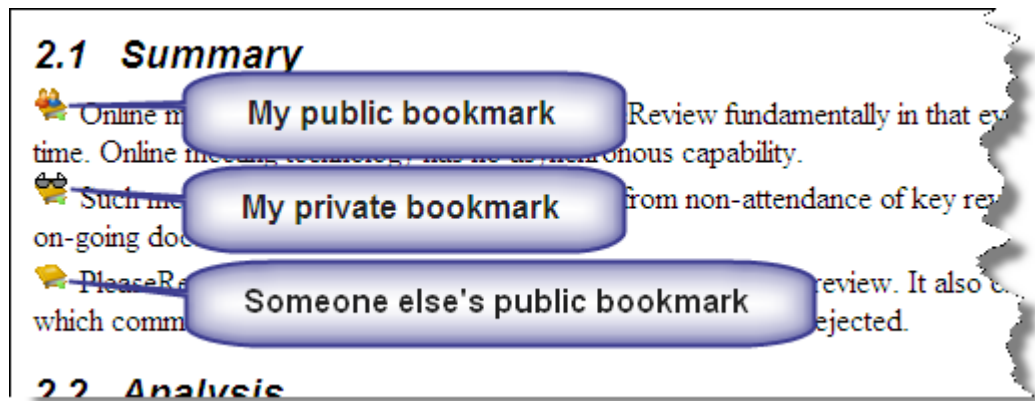
My Private bookmark by Demo Reviewer 1
Delete
Edit
Convert to comment

In total, there are three bookmark icons which may be displayed. These are shown in context and described below:

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## Icon Description



Another participant's public (by definition) bookmark. You won't see another participant's private bookmarks.

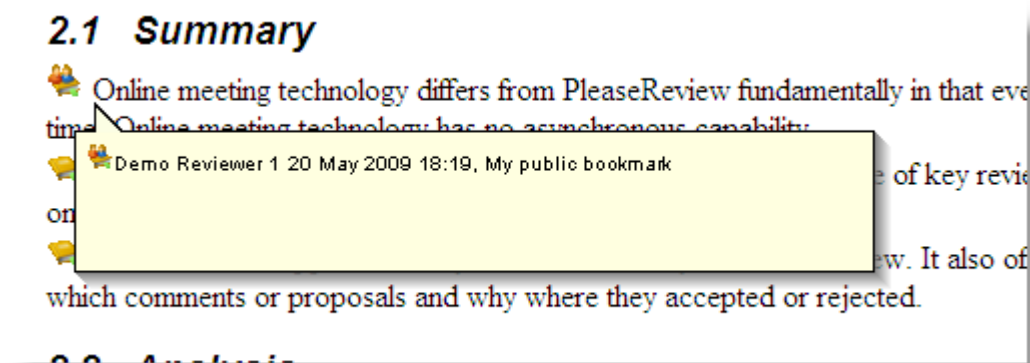


Your own public bookmark - will be seen by other participants.



Your own private bookmark - will not be seen by other participants.

'Mousing over' the bookmark icon will pop-up further information, as shown below:



The bookmarks will also be displayed in the navigation pane if 'Bookmarks' is selected in the drop-down box.



If you have notes associated with a bookmark, these can easily be converted into a comment by clicking on the 'Convert to comment' link.



Selecting this will open the 'Comment' tab with the bookmark's notes pre-filled with the comment. This can then be edited. This functionality allows the Reviewer to make private notes on the document as they read it, and then go back and decide whether to convert the notes into comments.

Bookmarks do not appear in the reconciliation report, and are not accepted or closed by an Author.

#### **4.10 EditZones (Reviewer)**

EditZones are areas of the document (Microsoft Word only) which may be edited by Contributors. Thus, they may not remain static throughout the review.

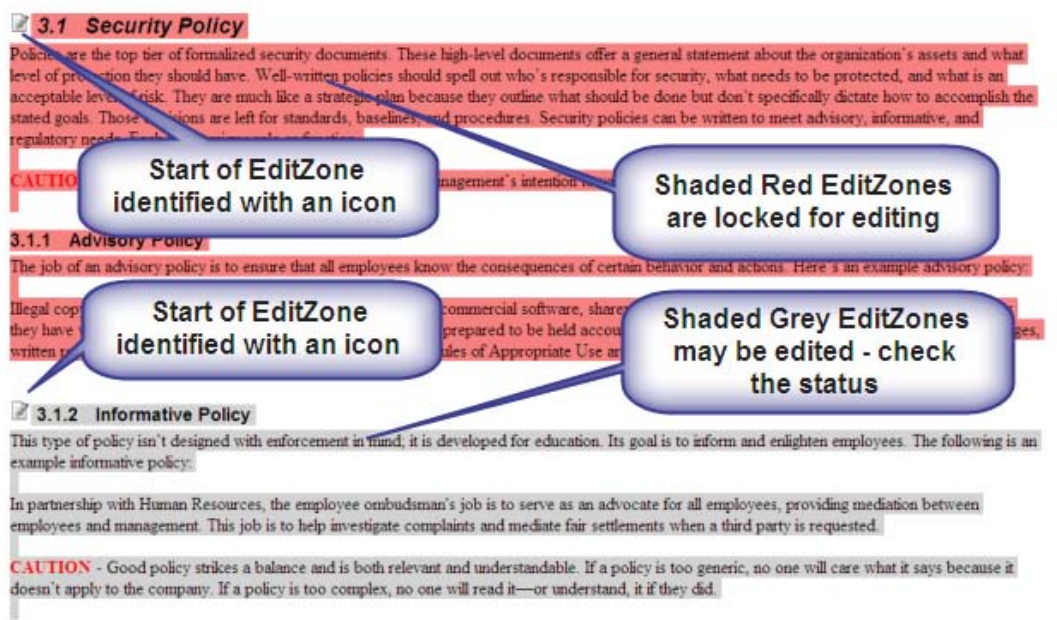
This provides a very powerful capability that allows different parts of the document ('EditZones') to be authored in parallel, and then for each part to be released for review once it is available. So Contributors responsible for each EditZone can edit the EditZone, make it available for review, and then re-edit the EditZone to incorporate changes and, again, make it available for review. This allows different parts of the document to be finalized at different times and in parallel.

From a Reviewer's perspective, the EditZone is either available for review or it is locked for editing (in which case it cannot be reviewed). It should be noted that Contributors can update the EditZone without making it available for review. This is in effect posting a 'work in progress'.

EditZones are identified by background shading of the text. The shading also denotes the EditZone status. The colors are system configurable and the shading can even be removed completely.

Note: This document uses the default colors which have been 'strengthened' for effect. The actual default colors are more subtle and it is possible the colors on your system may be different or removed altogether.

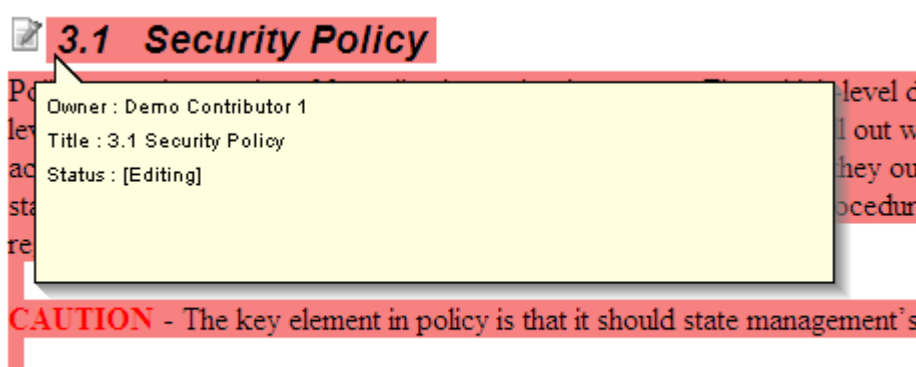
A section of the document with two EditZones is shown below:



The red shading indicates that the EditZone is locked for editing and you are unable to comment on the area.

The Gray shading indicates that the area of the document is an EditZone and may be edited by the Contributor. Thus, it is sensible to check the EditZone status prior to commenting.

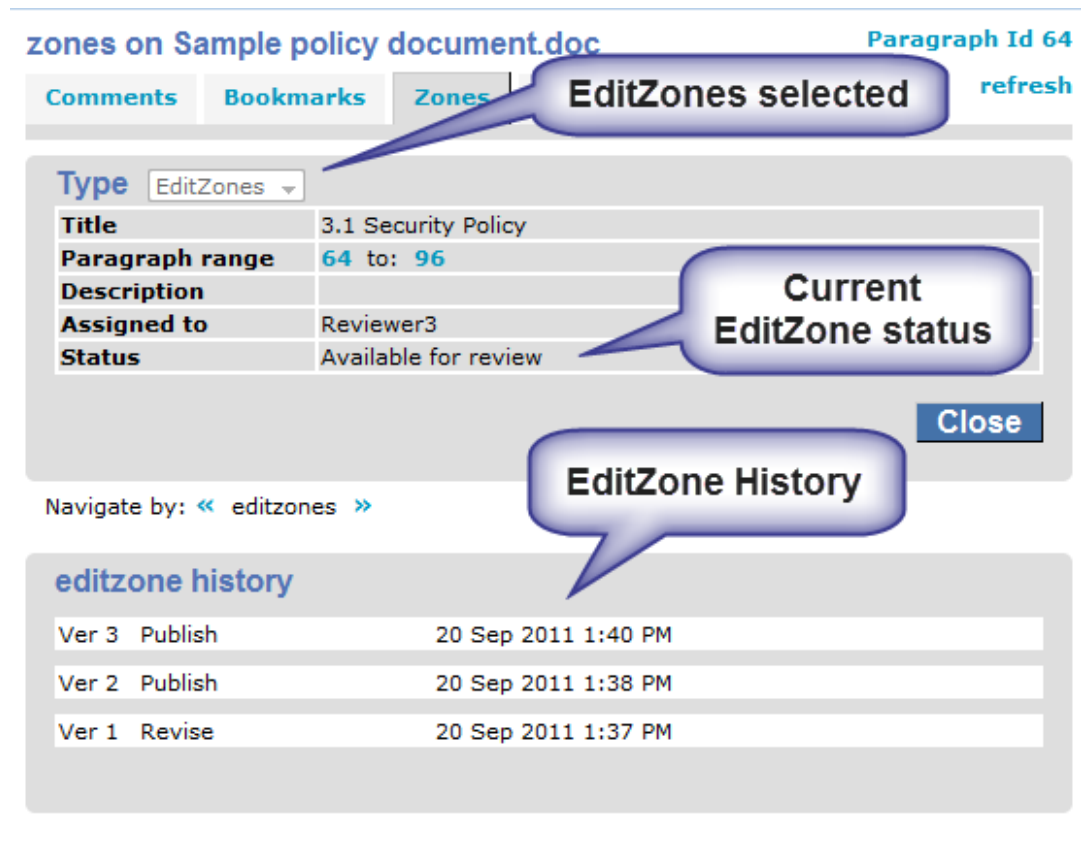
You can check the status by 'mousing over' the EditZone icon as follows:



Alternatively, you can click on the paragraph. The comment window will open in the normal way. Select the 'Zones' tab (unless you are navigating by EditZones, in which case it will automatically be selected). Note: if you click on a paragraph locked for editing, the only tab available will be the 'Zones' tab.

The 'Zones' tab provides information on the title of the EditZone (with any optional description), the Contributor to which it is allocated and the current status. It may also provide the EditZone history (if any). If ReviewZones are enabled within the review then you need to ensure you have the correct Zone Type selected on the 'Zones' tab.

Note: under 'editzone history', the term 'Publish' means that the EditZone was 'published' for review, while the term 'Revised' indicates that the zone was updated but not made available for review (i.e. 'work in progress').



**zones on Sample policy document.doc** Paragraph Id 64 refresh

Comments Bookmarks **Zones**

**EditZones selected**

Type EditZones

<b>Title</b>	3.1 Security Policy
<b>Paragraph range</b>	64 to: 96
<b>Description</b>	
<b>Assigned to</b>	Reviewer3
<b>Status</b>	Available for review

**Current EditZone status**

Close

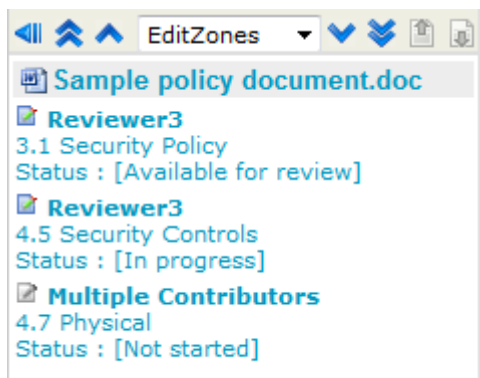
Navigate by: << editzones >>

**editzone history**

Ver 3	Publish	20 Sep 2011 1:40 PM
Ver 2	Publish	20 Sep 2011 1:38 PM
Ver 1	Revise	20 Sep 2011 1:37 PM

**EditZone History**

EditZones will be shown in the navigation pane when the 'EditZones' option is selected in the drop-down box. Brief summary information is also given.



Navigation pane showing EditZones selected:

- Sample policy document.doc**
- Reviewer3**  
3.1 Security Policy  
Status : [Available for review]
- Reviewer3**  
4.5 Security Controls  
Status : [In progress]
- Multiple Contributors**  
4.7 Physical  
Status : [Not started]

#### 4.10.1 Notes on EditZones with Comments and Bookmarks

If you have made comments and/or changes, or added a bookmark to a paragraph which is in an EditZone, the comments, changes and bookmarks will be 'lost' once the Contributor has 'revised' (i.e. updated) the EditZone.

The comments and changes will have been available to the Contributor to include in the revision being edited but the comments and/or changes will not appear in the updated EditZone.

The comments and/or changes will be available in 'reconciliation report' format from the 'EditZone History' screen (accessed from the review control panel – see [Document History](#)) but the bookmarks will simply be lost.

#### 4.11 Document History

Where a review includes participants with the role of 'Contributor', an 'EditZone History' option will be available on the review control panel.

This link opens the 'EditZone History' screen which lists all of the changes made to the EditZones.

##### Editzone History - User manual again

Select Comments Refresh				
Date	Editzone	Contributor	Event	
3 Jun 2009 17:26	3.1 Security Policy	Demo Contributor 1	Publish version 6	
3 Jun 2009 17:24	3.1 Security Policy	Demo Contributor 1	Revise version 5	<a href="#">view doc</a> <a href="#">view report</a>
3 Jun 2009 17:23	3.1.2 Informative Policy	Demo Contributor 2	Revise version 1	<a href="#">view doc</a> <a href="#">view report</a>
21 May 2009 16:26	3.1 Security Policy	Demo Contributor 1	Publish version 4	<a href="#">view doc</a> <a href="#">view report</a>
21 May 2009 16:23	3.1 Security Policy	Demo Contributor 1	Publish version 3	<a href="#">view doc</a> <a href="#">view report</a>
21 May 2009 16:22	3.1 Security Policy	Demo Contributor 1	Publish version 2	<a href="#">view doc</a> <a href="#">view report</a>
21 May 2009 16:22	3.1 Security Policy	Demo Contributor 1	Revise version 1	<a href="#">view doc</a> <a href="#">view report</a>
21 May 2009 15:25		Demo Owner	Original Document	<a href="#">view doc</a> <a href="#">view report</a>

[Back](#)

The 'view doc' option allows you to view the entire document as it existed immediately after the listed event. The 'Select Comments' option (at the top right of the screen) allows you to specify which comments and changes, if any, are included in the download.

Comments and changes are included in the download by default using the default settings. So, by default, all open and accepted comments and proposed changes are included in the download. Accepted proposed changes will be shown in the downloaded document as inserted text, whilst open proposed changes will be shown as standard Word 'tracked changes'. PleaseReview comments are always included as standard Word comments.

For more information on the comment section options and the rendering of the comments in Word please see [Word Document 'Round-tripping'](#).

The 'view report' option allows you to view the reconciliation report (for the entire document) as it existed immediately after the listed event. This includes all standard reconciliation report functionality – please see [Reconciliation Report](#).



#### Notes:

- When an EditZone is edited, all comments and proposed changes made on the EditZone (not on other areas of the document) are 'lost' and will not be carried forward when the revised EditZone is published. The only way to ascertain the comments and proposed changes which existed on the EditZone prior to its download and revision is via the EditZone history report;
- For example, if an EditZone is 'revised' on May 12th and that existing revision was subsequently 'published' by the Contributor (i.e. no further changes were uploaded) on a later time/date, the edit history may actually show it as being published on the date of the revision (May 12th) rather than the date it was 'published'.

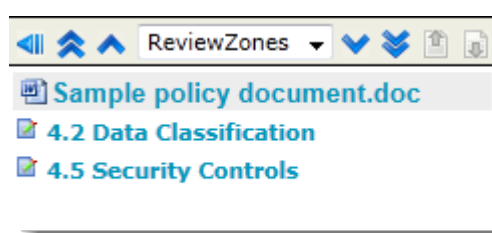
### 4.12 ReviewZones

ReviewZones are applicable to Word documents only. These are areas of the document selected by the review Owner to prevent individual users from reviewing (i.e. commenting upon and marking-up) or possibly even viewing.

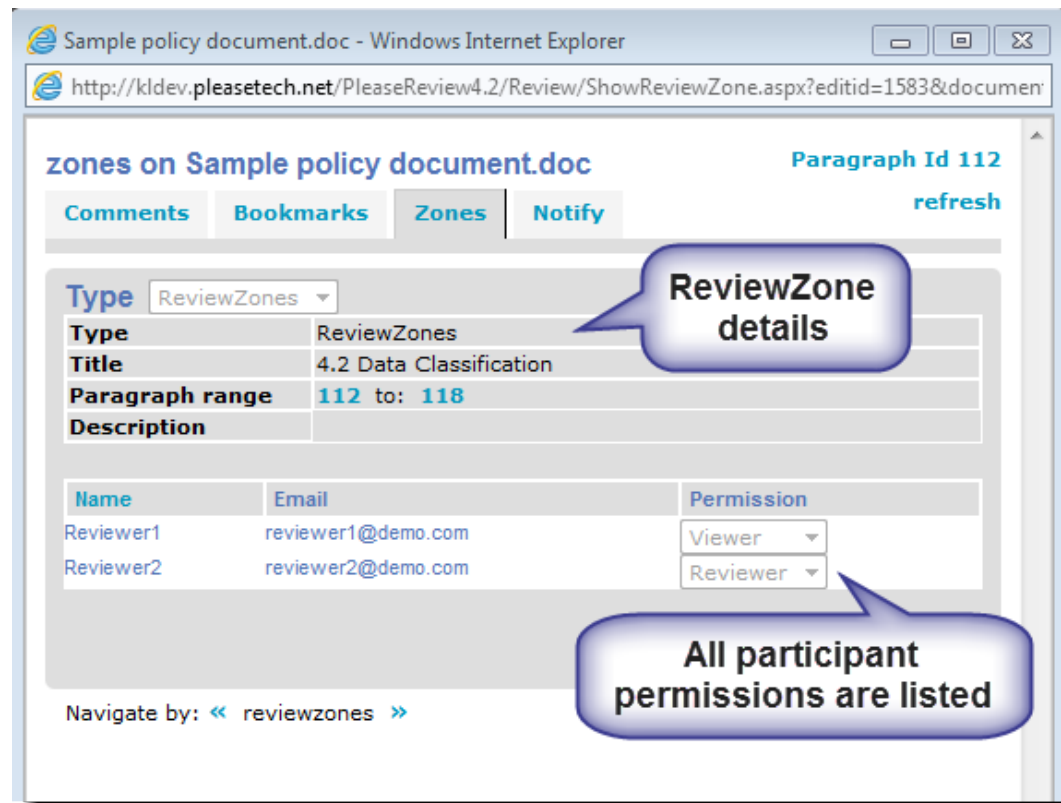
From a Reviewer's perspective, a ReviewZone will either be:

- (i) available for review (i.e. the reviewer can make comments/changes in the normal manner);
- (ii) available for viewing only (in this case the ReviewZone will show the text in the document view whilst the comment window will show a message informing the reviewer that they do not have permission to make comments/changes but can see other reviewer's comments/changes), or;
- (iii) hidden from the user (i.e. the user can not see the document text or other reviewers' comments/changes). Note: if the ReviewZone is 'hidden' the comment window will show the same message whilst the text will be missing from the document body.

You can check for ReviewZones in the document by selecting ReviewZones from the drop-down box in the navigation pane:



If you click on a bookmark heading for a ReviewZone which is only available for you to view the document body will scroll to the selected location and the comment window will open at the Zones tab:



If you click on a bookmark heading for a ReviewZone which is NOT available for you to view the document body will not scroll and the comment window will open at the Zones tab:

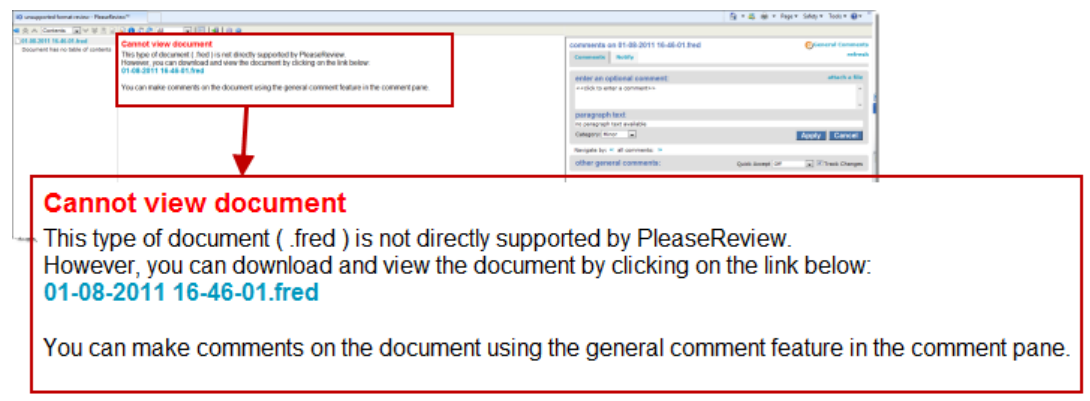


If you are not able to see the entire document the option to download the document from the review will be disabled.

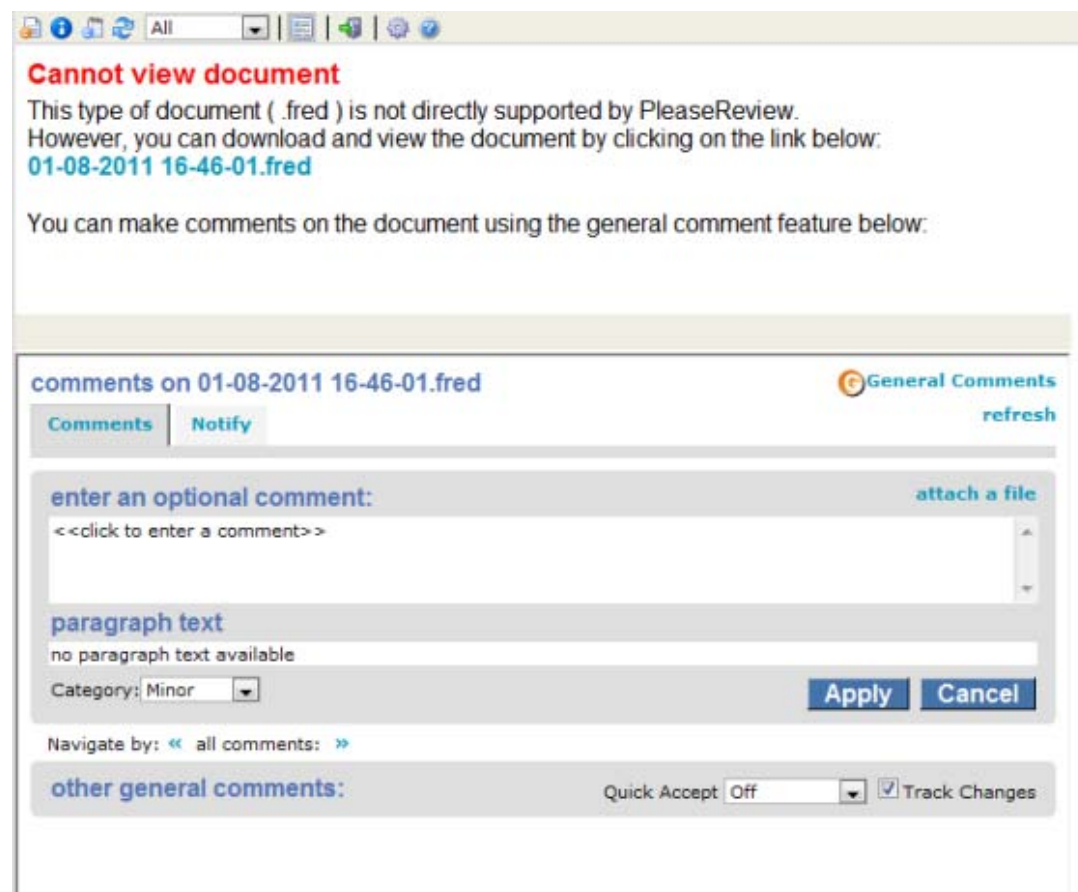
#### 4.13 Reviewing Unrecognized Document Types

When an unsupported format document is included in a review and a participant accesses it, instead of simply opening the document automatically, they will be presented with a message as shown below:





Where the participant is using the pop-up comment window (as opposed to the comment pane shown above), the general comment window is included in the document view as shown below:



## 4.14 Notify and Review Watching

### 4.14.1 Notify

The 'Notify' tab (if available) allows review participants to send an email, including a link to the individual paragraph/location together with personal comments, to selected review participants. This makes it easy to draw another participant's attention to a specific paragraph/location.

Note: There is also a 'Notify' option on the review control panel. The difference is that the link in the email generated by this option takes the user to the review itself, and not to an individual paragraph/location in a document.

The email text is customizable for each installation. However, the email will show you as the sender (unless PleaseReview is set up to send generic emails, in which case the email will have come from the generic system email address), and will include your text and a link to the paragraph/location.

**notify paragraph on Sample policy document.doc** Paragraph Id 98

Comments | Bookmarks | Zones | **Notify**

---

**email subject**  
Paragraph notification - Review of "EditZones"

**email body**

Your message here

**select participants**

- ☒ Bob Auth-Contrib
- ☒ Jason Contributor
- ☒ Sue (watching)
- ☒ Tim SuperContributor

Select All    Deselect All

Watch status on this paragraph/location indicated

Send    Close

The operation of the screen is simple. The email subject is pre-populated but may be edited, your message is entered into the 'email body' area, the review participants are selected and the 'Send' button is clicked to send the email. Please note that you are not given a preview. The email is sent immediately when you click the 'Send' button. You receive confirmation that the emails have been sent.

Email messages have been sent successfully

Close

#### 4.14.2 Who is Watching

The 'Notify' tab (if available) also provides an insight into which participants are 'watching' a particular paragraph/location.

Participants 'watching' the paragraph/location are identified by having '(watching)' after their name on the participants list – see above.

#### 4.15 Leaving the Review and Review Status

When you have finished commenting on a review, click the 'leave the review' icon



All clicks that would cause you to leave the review (for example 'Logout' if the header is shown) will initially behave in the same way as if you had clicked the 'Finish' icon. However, if you leave the review by closing the browser window completely, you do not get the opportunity to set your review status, make any summary comments and set your review 'watch' status.

Each Reviewer has an individual status in the review which is recorded on the review control panel. Your status is set with the radio buttons (shown below) and you can enter comments in the space provided.

##### finish review



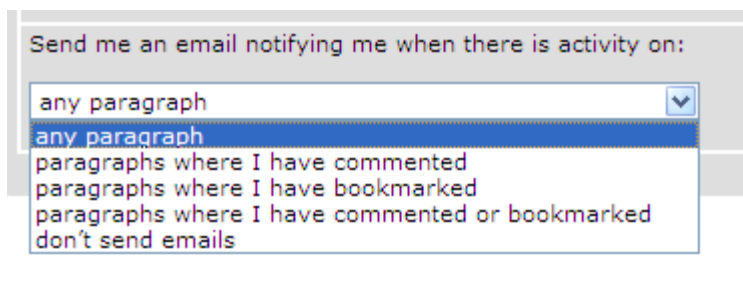
Summary comments entered appear on the review control panel and in the comment reconciliation report.

Review status options are explained below:

Review Status	Description
In progress	The Reviewer has started reviewing the document(s). This status is set automatically by PleaseReview once you enter the review for the first time. On leaving the review you have the option to leave your status as 'In progress', or to indicate that you have completed your review by selecting 'Completed'.
Completed	The Reviewer has indicated that they have completed their review of the document(s). Note: this is purely a status flag and it is possible for the Reviewer to go back into the review to comment at any time (regardless of this setting) until the Owner has 'Closed' the review.
Offline	The Reviewer is reviewing the document 'Offline'.

Note that the status of the Owner is never updated.

Each Reviewer can set a review 'watch' status.




Watch event	Description
Any paragraph	An email is sent if there is any activity on the review (i.e. another Reviewer comments anywhere on the document(s) or responds to another Reviewer's comment, or an Author accepts/closes an item).
Paragraphs where I have commented	An email is sent only if there is any activity on the paragraphs upon which the Reviewer has commented.
paragraphs where I have bookmarked	An email is sent only if there is any activity on the paragraphs upon which the Reviewer has a private or public bookmark.
Paragraphs where I have commented or bookmarked	An email is sent only if there is any activity on the paragraphs upon which the Reviewer either has commented, or has a private or public bookmark.
Don't send emails	The Reviewer receives no 'watch' emails.

Only one 'watch' email is sent until either the Reviewer re-enters the review or views the reconciliation report.

Notes:

- From this screen the review returns to 'my reviews' ;
- If you leave the review by closing the browser window, your status will be shown as 'In progress';
- If 'Time in the Review' is enabled, the Reviewer will be prompted to enter a value (in minutes) for the time spent in the review (see [Time in the Review](#)).

#### 4.16 Reconciliation Report

Selecting 'View Report' from the review control panel (or the  icon from the toolbar in the review) opens the reconciliation report in a new window. In general:

- The report contains all summary information on the review;
- The report contains all comments for the documents/images (subject to selection);
- Where an Author has accepted/closed comments, any reconciliation comments will be included under the 'Author comment' column;

- 'Select Comments' provides a means to customize the report to include/exclude various comments (see [Customization](#)). Note: by default all comments are shown.

There are minor differences with respect to the information given depending on the document type.

#### 4.16.1 Word

**Customise report** [Select Comments] [Print] [Close]

**Review details**

Title	Version 4 User manual
Description	
End Date	30 May 2009 23:45
Review Status	In Progress

**Reviewer details**

Name	Status	Role	Summary	Comments
Demo Author 1	In Progress	Author		0
Demo Author 2	Not Started	Author		0
Demo Contributor 1	Not Started	Author-Contributor		0
Demo Contributor 2	Not Started	Author-Contributor		0
Demo Owner	Not Started	Owner		0
Demo Reviewer 1	In Progress	Reviewer		10
Demo Reviewer 2	In Progress	Reviewer		0
Demo Reviewer 3	In Progress	Reviewer		6
Demo Reviewer 4	In Progress	Reviewer		0

**Word downloads**

**Word heading level**

**Link back to review**

Para	Text	T	S	Author comment
1	Policies, Procedures, Standards, Baselines, and Guidelines			
7	Security is truly a multilayered process. After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments.	P		Proposed Change (1) by Demo Reviewer 1 on 15 May 2009 13:47 Category : Minor After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments. Demo Reviewer 1 (15 May 2009 13:47)
9	For security to be effective, it must permeate every level of the hierarchy. Senior management must make decisions on what should be protected, how it should be protected, and to what extent it should be protected. These findings should be crafted into written documents.	P		Proposed Change (3) by Demo Reviewer 3 on 15 May 2009 17:24 Category : Minor For security to be effective, it must start at the top of this is another change an organization. It must permeate every level of the hierarchy. Senior management must make decisions on what should be protected, how it should be protected, and to what extent it should be protected. These findings should be crafted into written documents. Demo Reviewer 3 (15 May 2009 17:24)
11	Before these documents are locked in as policies, they must be researched to verify that	P		Proposed Change (7) by Demo Reviewer 3 on 19 May 2009 15:09

The reconciliation report for a Microsoft Word document contains a paragraph identifier, the original paragraph text, the comment type, the associated comments, the comment status and associated Author reconciliation comment.

- An indication is given as to the Word heading level for all entries. This allows for easy identification of where the paragraph is located in the document;

Para	Text	T	S	Author comment
1	Policies, Procedures, Standards, Baselines, and Guidelines			
7	Security is truly a multilayered process. After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments.	P		Proposed Change (1) by Demo Reviewer 1 on 15 May 2009 13:47 Category : Minor After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments. Demo Reviewer 1 (15 May 2009 13:47)

**Word heading text shown**

- The paragraph number and the comment type are hyperlinks which open the review in the main window (not the report window). The paragraph number link scrolls the document to the comment location. The comment type link scrolls the document to the comment location and opens the comment window;

- The Word downloads option (top left hand side of the main table and identified above) allows:
  - A copy of the Word document to be downloaded with each paragraph numbered (see below - paragraph numbers are added in square brackets and colored blue, i.e. [nnn]). In a 'print' situation (i.e. no online access to the system), this allows the matching of a paragraph in the reconciliation report to its exact location in the document.

## [5] Policies, Procedures, Standards, Baselines, and Guidelines

[6]  
 [7]Security is truly a multi-faceted issue. As the organization's security posture is completed, policies will fall quickly in place. The organization must determine the risk to determine security policies based on the risk assessments.  
 [8]  
 [9]For security to be effective, it must start at the top of an organization. It must permeate every level of the hierarchy. Senior management must make decisions on what should be protected, how it should be protected, and to what extent it should be protected. These findings should be crafted into written documents.  
 [10]  
 [11]Before these documents are locked in as policies, they must be researched to verify that they will be compliant with all federal, state, and local laws. These documents should also clearly state what is expected from employees and what the result of noncompliance will be.  
 [12]  
 [13]Image:

 please review  
 collaborative document review & authoring

[14]

[15]

**Each paragraph is identified with a unique number which corresponds with the reconciliation report**

- A copy of the reconciliation report as a Word document. Note: The Word document will reflect the displayed report (i.e. any comment selection made via the 'Select Comments' option).

### 4.16.2 PDF

The reconciliation report for a PDF document contains a scaled-down copy of each page where there are comments, complete with numbered comment locations. These comment numbers are shown in the comment summary below each page. Where the comment is on a graphic area, the original paragraph text is replaced by the word '(Area)'.

report for sample ls.pdf (sample ls.pdf)

[download report as word](#)

Posn	Text	T	Comment	S	Author comment
[1]	Revised Recommendations	C	Comment (1) by Sue on 27 Sep 2011 11:56 Category : Minor Sue (27 Sep 2011 11:56) asdf asdf asdf	O	
[2]	Pathogen Assays Used	P	Proposed Change (2) by Sue on 27 Sep 2011 11:57 Category : Minor Pathogen Assays Used asdf asdf ds Sue (27 Sep 2011 11:57)	O	
[3]	(Area)	C	Comment (3) by Sue on 29 Sep 2011 9:58 Category : Minor Sue (29 Sep 2011 9:58) area comment text	O	

#### 4.16.3 PowerPoint

The reconciliation report for a PowerPoint presentation is very similar to a PDF document and contains a scaled-down copy of the slides with comments, complete with numbered comment locations. Comment numbers are shown in the comment summary below each slide.

Comments on the slide notes behave very similarly to comments on Word paragraphs, with the paragraph number being replaced by the slide number.

report for pleasereview intro for PR demo (pleasereview intro for PR demo.ppt)

[download report as word](#)

Posn	Text	T	Comment	S	Author comment
[1]		C	Comment (10) by Demo Reviewer 1 on 22 May 2009 11:52 Category : Minor Demo Reviewer 1 (22 May 2009 11:52) A comment on this location	O	
[2]		C	Comment (15) by Demo Reviewer 3 on 22 May 2009 11:55 Category : Minor Demo Reviewer 3 (22 May 2009 11:55) a comment from me here	O	
1	These are the speakers notes for slide 1. They are treated as text in PleaseReview.	P	Proposed Change (11) by Demo Reviewer 1 on 22 May 2009 11:52 Category : Minor These are the speakers a proposed change on the speakers notes for slide 1. They are treated as text in PleaseReview. Demo Reviewer 1 (22 May 2009 11:52)	O	

#### 4.16.4 Image

The reconciliation report for an image is the same as for a PowerPoint slide.



#### 4.16.5 Excel

The reconciliation report for an Excel document is very similar to the Word document report except the paragraph identifier is the cell reference preceded by the sheet name.

report for workgroup.xlsx (workgroup.xlsx)  
[download report as word](#)

Para	Text	T	Comment	S	Author comment
csvDownload (3) (Cell A2)	Workgroup : sue	C	Comment (4) by Test User1 on 26 Sep 2011 15:36 Category : Minor Test User1 (26 Sep 2011 15:36)	A	Sue (26 Sep 2011 15:37):Accepted: def ade fa
csvDownload (3) (Cell B2)			Comment (1) by Test User1 on 26 Sep 2011 15:29 <del>askd jfkdelj</del> Sep 2011 15:29)	O	

Sheet name and cell reference

#### 4.16.6 Customization

The report can be customized by using the 'Select Comments' button. This allows you to select which comments are displayed.

Select comments by:

Document	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Sample policy document.doc <input checked="" type="checkbox"/> bbc.pdf <input checked="" type="checkbox"/> pleasereview intro for PR demo.ppt																																																	
Status	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Closed <input checked="" type="checkbox"/> Accepted <input checked="" type="checkbox"/> Open																																																	
Type of comment	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> General <input checked="" type="checkbox"/> Comment <input checked="" type="checkbox"/> Proposed Change																																																	
Comment category	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Minor <input checked="" type="checkbox"/> Major <input checked="" type="checkbox"/> Cosmetic <input checked="" type="checkbox"/> <Blank>																																																	
Participant	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> dave <input checked="" type="radio"/> Made a comment <input checked="" type="checkbox"/> dave2 <input type="radio"/> Participated in discussion																																																	
Date	<input checked="" type="radio"/> All <input type="radio"/> Since I viewed the reconciliation report 6 May 2010 13:06 <input type="radio"/> Since: date : <input type="text"/> <input type="text"/> <input type="text"/> time : <input type="text"/> <input type="text"/> <div> <div>&lt; May 2010 &gt;</div> <table border="1"> <tr> <th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th><th>Sun</th></tr> <tr> <td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td></tr> <tr> <td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td></tr> <tr> <td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td></tr> <tr> <td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr> <td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr> <tr> <td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr> </table> </div>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6
Mon	Tue	Wed	Thu	Fri	Sat	Sun																																												
26	27	28	29	30	1	2																																												
3	4	5	6	7	8	9																																												
10	11	12	13	14	15	16																																												
17	18	19	20	21	22	23																																												
24	25	26	27	28	29	30																																												
31	1	2	3	4	5	6																																												

#### 4.17 Options from the Review Control Panel

There are various options available from the review control panel. Most of these (with the exception of 'Status') can be disabled through the system setup and may be unavailable. In the case of 'Download copy', if available through the system setup, it may be disabled by the Owner on a 'per review' basis.

[Status](#)
[Download copy](#)
[Notify](#)
[Editzone](#)
[History](#)



Note: The 'Editzone History' option will only be available if the review contains Contributors (please see [EditZones \(Reviewer\)](#)).

#### 4.17.1 Status

In addition to being able to set your review status and your review 'watch' status on exiting a review, it is possible to access the status options from the review control panel by selecting 'Status'.

#### set status - Version 4 User manual

Set Status

Download copy

update your participant status

Select a value to indicate your status to the author

☐ Not started
 ☒ In progress
 ☐ Completed
 ☐ Offline

Enter an optional summary comment to appear on the author's review status page

Send me an email notifying me when there is activity on:

any paragraph

Save

Back

#### 4.17.2 Download Copy

If enabled by system policy, the Owner has the option to allow Reviewers to download a copy of the original document. In this event the 'Download copy' tab will be enabled. Reviewers can optionally include comments already made in the downloaded document (Word, Excel and PDF only, for PDF documents users must have a full version of Acrobat and the PDF plug-in installed, for more information see [PDF](#)). Documents which do not support the downloading of comments will have the 'Show Comments' checkbox grayed out.

## download copy - Mixed documents

Set Status
Download copy

Document	Show Comments	Select Comments
Sample CTR (3_5).doc	<input type="checkbox"/>	<a href="#">Download</a>
workgroup.xlsx	<input type="checkbox"/>	<a href="#">Download</a>
sample ls.pdf	<input type="checkbox"/>	<a href="#">Download</a>
Presentation1.pptx	<input type="checkbox"/>	<a href="#">Download</a>

Click to download a copy of the document(s).  
You should save the document onto your local machine (do not right-click).

Select "Show comments" to include comments made by other reviewers in the downloaded document. Click "Select Comments" to tailor the download (n.b. this only takes effect if "Show comments" is selected).

### 4.17.2.1 Downloading Word Documents with Comments

At the Download Copy window, if the 'Show Comments' option has been checked then the comments are rendered in the Word document as defined in the 'Select Comments' option (a link to this is above the 'Download' column). The default position is defined below (for a detailed explanation of all options please see [Word Document 'Round-tripping'](#)).

#### PleaseReview Comment Status

#### Appears in the Word document as

Closed or Withdrawn  
comments of all types

Do not appear in the Word document by default.  
If included, will always appear as a Word  
comment.

Accepted or Open  
comments

Appear in the Word document as Word  
comments.

Accepted Proposed  
Changes

Replace the paragraph. In other words, the new  
wording is inserted in the document in place of  
the old paragraph.

Open Proposed Changes

Are inserted into the Word document as 'red-  
lined' tracked changes for the appropriate  
paragraph/ word.

Notes:

- Once you have downloaded the Word document with the mark-up as described above, you are in Word and all standard Word functionality appears;
- The document provided under the 'Download copy' tab **cannot** be used for offline review. For details of offline review see [Offline Review Client](#).

### 4.17.2.2 Downloading Excel Documents with Comments

At the Download Copy window, if the 'Show Comments' option has been checked then the comments are rendered in the Excel document as defined in the 'Select Comments' option (a link to this is above the 'Download' column). The default position is defined below.

## PleaseReview Comment Status

Closed or Withdrawn  
comments of all types

Accepted or Open  
comments

Accepted Proposed  
Changes

Open Proposed Changes

## Appears in the Excel document as

Do not appear in the Excel document by default.  
If included, will always appear as Excel  
comments.

Appear in the Excel document as Excel  
comments.

Replace the paragraph. In other words, the new  
wording is inserted in the document in place of  
the old paragraph.

Are inserted into the Excel document as Excel  
comments.

Note: If the uploaded spreadsheet is 2003 (xls) format, accepted proposed changes to formula cells are shown in the downloaded document as comments, not by updating the cell contents.

### 4.17.3 Notify

The 'Notify' option (if available) allows review participants to send an email including a link to the review, together with personal comments, to selected review participants (see below).

The email text is customizable for each installation. However, the email will show the initiator of the email as the sender, and will normally include the same links as the review invitation email.

#### notify - send an email link to review participants

**select participants**

Name	Email	Selected
Demo Author 1	Demo_Author_1@pleasotech.com	<input checked="" type="checkbox"/>
Demo Author 2	Demo_Author_2@pleasotech.com	<input checked="" type="checkbox"/>
Demo Contributor 1	Demo_Contributor_1@pleasotech.com	<input checked="" type="checkbox"/>
Demo Contributor 2	Demo_Contributor_2@pleasotech.com	<input checked="" type="checkbox"/>
Demo Owner	Demo_Owner@pleasotech.com	<input checked="" type="checkbox"/>
Demo Reviewer 1	Demo_Reviewer_1@pleasotech.com	<input checked="" type="checkbox"/>
Demo Reviewer 2	Demo_Reviewer_2@pleasotech.com	<input checked="" type="checkbox"/>
Demo Reviewer 3	Demo_Reviewer_3@pleasotech.com	<input checked="" type="checkbox"/>
Demo Reviewer 4	Demo_Reviewer_4@pleasotech.com	<input checked="" type="checkbox"/>

Select All
Deselect All

**enter email details**

Subject
Review of "Version 4 User manual"

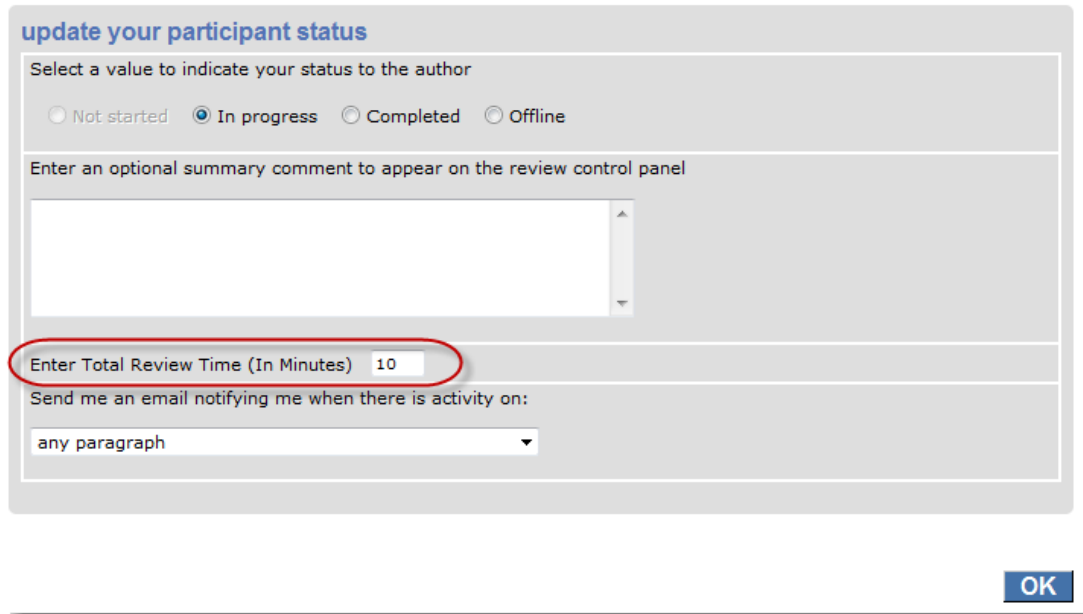
Body

OK
Cancel

#### 4.18 Time in the Review

PleaseReview can optionally prompt the Reviewer for the time spent in the review on the 'finish review' screen.

##### finish review



**update your participant status**

Select a value to indicate your status to the author

☐ Not started ☒ In progress ☐ Completed ☐ Offline

Enter an optional summary comment to appear on the review control panel

Enter Total Review Time (In Minutes) 10

Send me an email notifying me when there is activity on:

any paragraph

OK

This is a system policy configuration setting and so may be turned on or off at a system level. If turned off, it will not appear. The review time is recorded in minutes as a Reviewer-entered figure.

Note: The review time does not actually record the amount of time that the Reviewer has spent in the review (i.e. had the review open). The default is zero unless changed by the Reviewer.

If enabled, the time spent in the review is also recorded on the review control panel.

review control panel - demo on the 30th

demo on the 30th (id 127)

Description	sdsfd kjhsou saoi
Review Status	In Progress (Due: 30 Apr 2009 17:45; Started: 30 Apr 2009 17:14)
Total Review Time	10 minutes

**Total Review Time**

participants

Name	Status	Role	Summary	Comments	Review Time (mins)
Betty Reviewer	Not Started	Reviewer			0
Clare Reviewer	Not Started	Reviewer			0
Dave Owner	In Progress	Owner			0
Fred Author	Not Started	Author			0
Jim Reviewer	Not Started	Reviewer			0
Sue Contributor only	In Progress	Contributor			10
Tim Contributor	In Progress	Contributor			0

**Individual review times shown**

your comments

Document	Open	Accepted	Closed	Withdrawn
 Sample policy document	2	0	0	0

Status Download copy Notify View History

View Report Enter Review Back

#### 4.19 Review Metrics

PleaseReview includes an optional review metrics/categorization feature. The Reviewer would see this as a 'Metrics' button at the bottom of the review control panel.


Status Download copy Notify Editzone History

View Report Enter Review **Metrics** Back

The button's existence and its name are entirely configurable, as are the contents of the metrics screen which is displayed (see below for an example). For Reviewers, the screen is read-only and thus for information only.

This feature allows the categorization of the review for reporting purposes.

Custom review metrics

Node Id	<input type="text"/>
Size	<input type="text"/>
Units	Pages 
Stage Detected	Baseline 

OK Close

## 5 Offline Review Client

### 5.1 Introduction

The Offline Client ("OLC") is a client-based application designed to give Reviewers the 'online review experience' offline. This is a separate installation and its availability is controlled by a system policy setting.

Whilst online, Reviewers can download reviews available for offline review to the OLC. Once the reviews are in the OLC there is no need to be connected to the PleaseReview server to undertake a review. All comments etc. are kept within the OLC until uploaded. Once reconnected, the Reviewer simply uploads the comments which are then automatically added to the review.

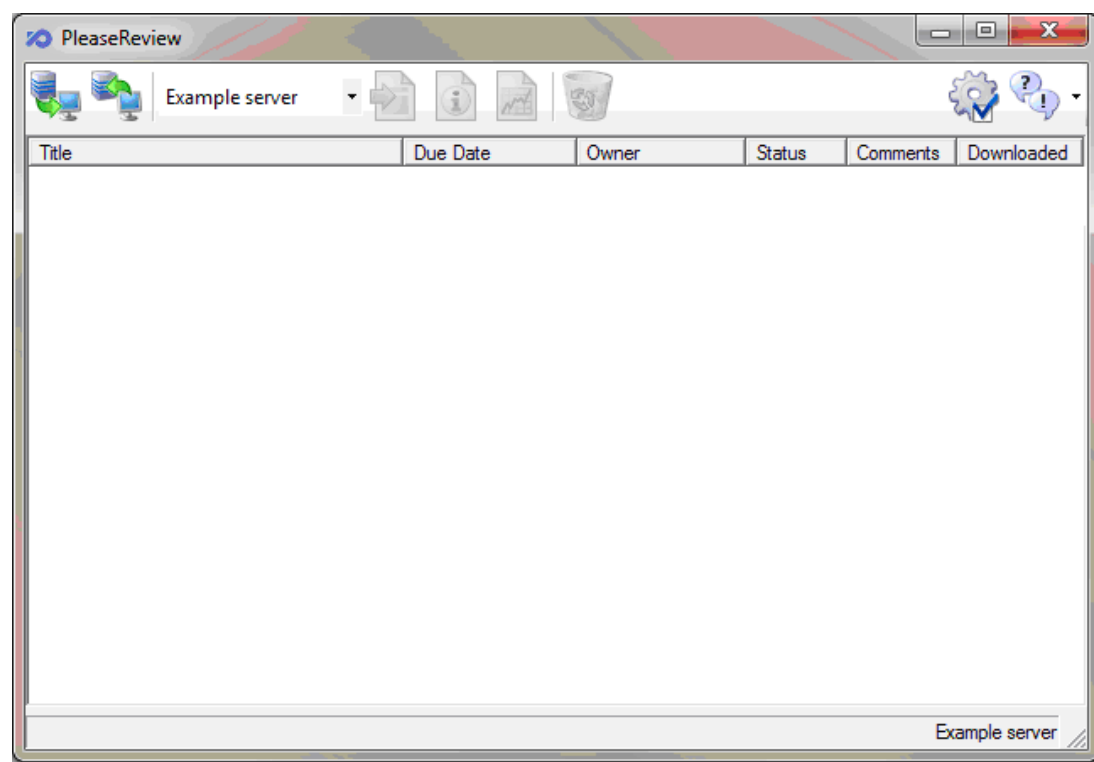
Note: If you download a review which contains EditZones you will not be able to make comments or propose changes on the EditZones regardless of their status in the review - this is because the EditZone may have been updated by the time your comments are uploaded. See [EditZones in the OLC](#) for more information.

### 5.2 Download

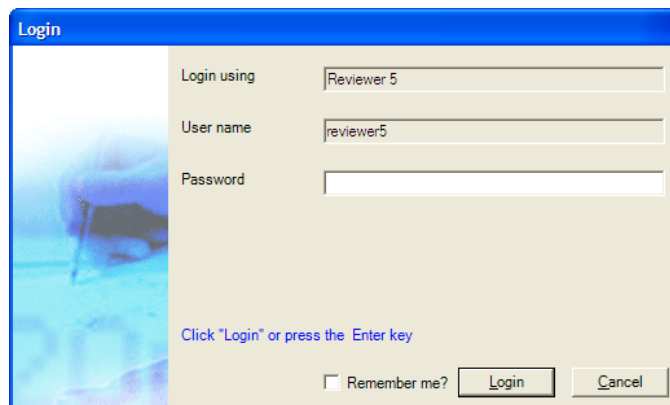
From the OLC in-box (shown below without any reviews downloaded), select the 'Download' button.



If you have multiple servers set up (see [Multiple Servers and Other Options](#)), ensure that you have the correct server selected. The selected server is shown in the in the bottom right hand corner.



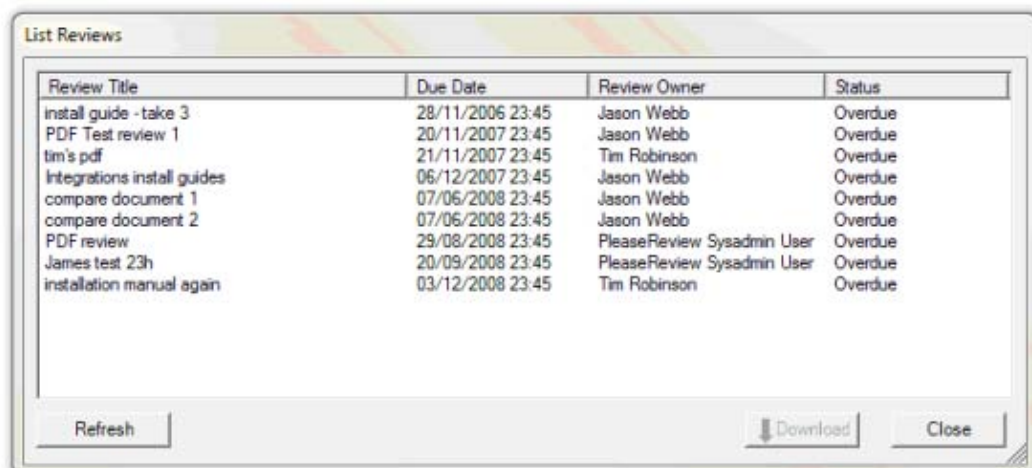
This will prompt you to enter your password to Login to the selected server:



A login dialog box titled "Login" with a blue header. It contains three input fields: "Login using" with the text "Reviewer 5", "User name" with the text "reviewer5", and "Password" which is empty. Below the fields is a blue link that says "Click 'Login' or press the Enter key". At the bottom, there is a checkbox labeled "Remember me?" which is unchecked, and two buttons: "Login" and "Cancel".

Having logged on, you will have a list of reviews available to you. Note: the list of reviews will be all of those for which you are a Reviewer, and that are available for offline review, from all workgroups. There is summary review information against each.

Note: if you have already downloaded a review(s) shown in the main window, it will not appear in the list, likewise for closed and completed reviews.

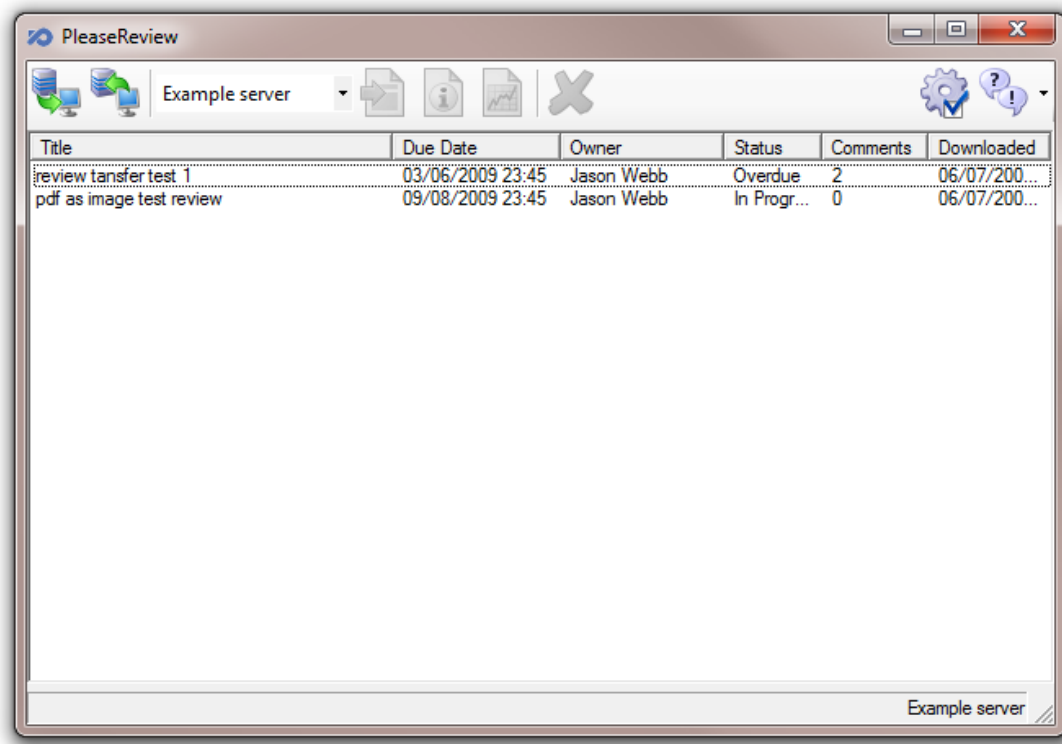


A dialog box titled "List Reviews" containing a table of review information. The table has four columns: "Review Title", "Due Date", "Review Owner", and "Status". Below the table are three buttons: "Refresh", "Download", and "Close".

Review Title	Due Date	Review Owner	Status
install guide - take 3	28/11/2006 23:45	Jason Webb	Overdue
PDF Test review 1	20/11/2007 23:45	Jason Webb	Overdue
tim's pdf	21/11/2007 23:45	Tim Robinson	Overdue
Integrations install guides	06/12/2007 23:45	Jason Webb	Overdue
compare document 1	07/06/2008 23:45	Jason Webb	Overdue
compare document 2	07/06/2008 23:45	Jason Webb	Overdue
PDF review	29/08/2008 23:45	PleaseReview Sysadmin User	Overdue
James test 23h	20/09/2008 23:45	PleaseReview Sysadmin User	Overdue
installation manual again	03/12/2008 23:45	Tim Robinson	Overdue

Select the review(s) you wish to download using the standard Windows commands. The reviews will be downloaded into the main OLC window. Note: your status in the review control panel (on the PleaseReview server) will automatically be set to 'Offline'.

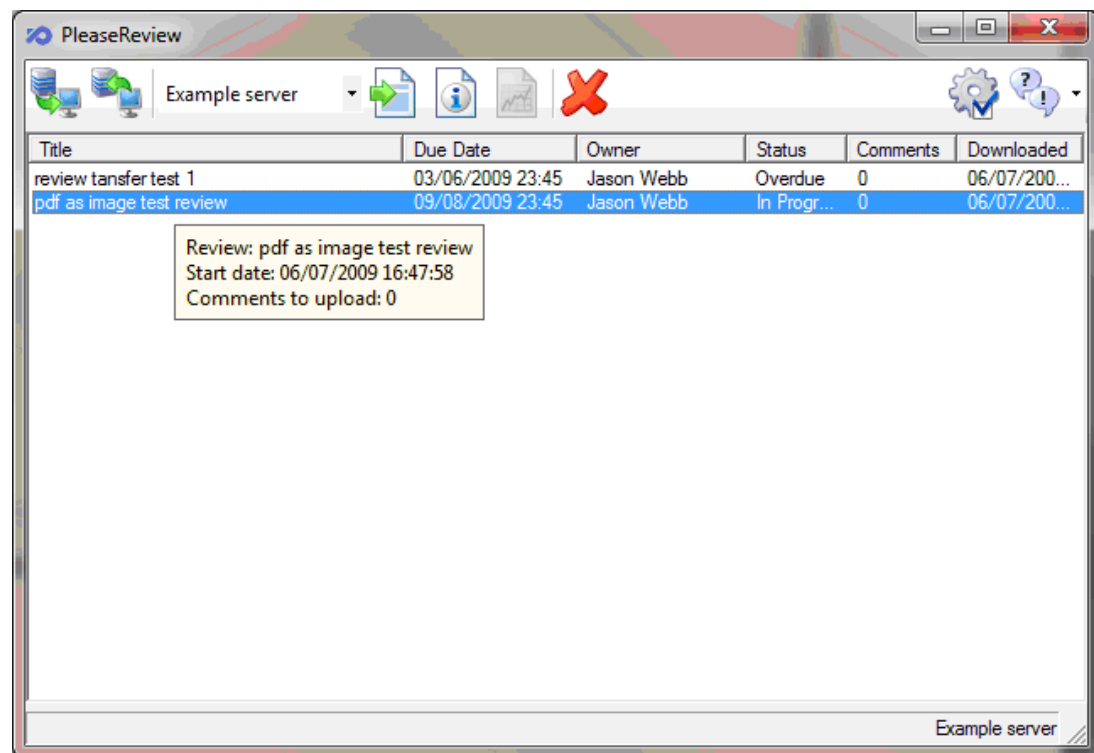




The main screen showing downloaded reviews.

### 5.3 OLC In-box and Options

The OLC in-box window lists all of those reviews you have downloaded. Reviews are listed with brief summary information. The 'Comments' column is the number of comments which you have made on the review whilst offline, and which have not been uploaded to the server.



Selecting a review activates the main toolbar. The buttons are as described below.

## Icons



## Description

Enter the review.



Open the review control panel (in a new window) for more details of the review.



Delete – deletes the review from the OLC. This cannot be undone! To get the review back you would need to download it again.



Opens report in a new window. Note: The report contains only the comments and changes you have made in the OLC. It is not a copy of the full reconciliation report.



An error condition has occurred. The OLC has failed to upload the comments.



Options button.

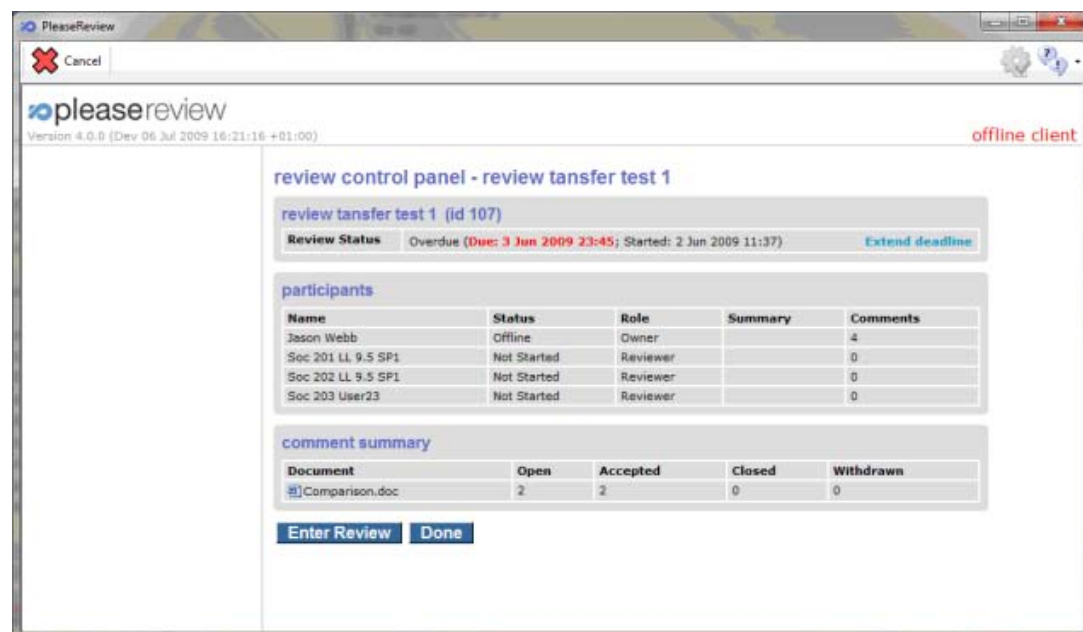


Help and log-file information.

As with the main PleaseReview application, you can either enter the review directly using the 'Enter the review' icon, or you can view summary review details in the review control panel using the 'Control Panel' icon.

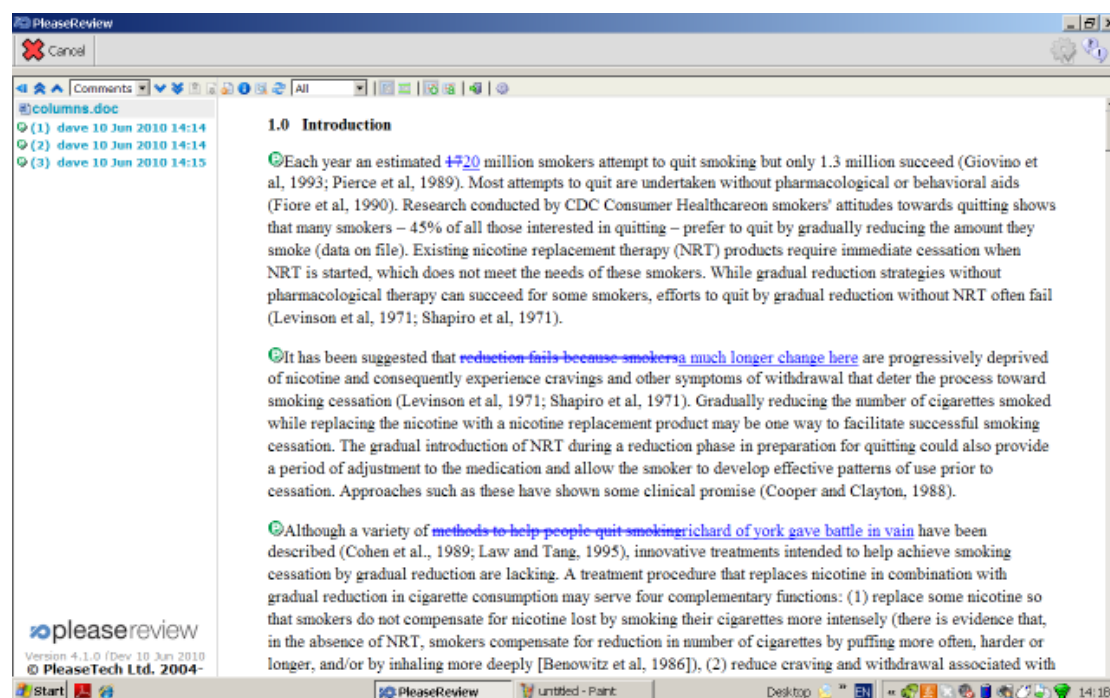
You can delete a review from the OLC using the 'Delete' button. This does not delete it from the PleaseReview server, only from the OLC.

The review control panel is shown below:



## 5.4 Reviewing with the OLC

The review experience using the OLC is as close as possible to the review experience when online. The review window offers the same functionality and is used in the same way.



The comment window contains all comments, including those from other Reviewers (except independent reviews), up to date when the review was downloaded. You are able to browse by 'Comments', etc.

Notes:

- It is not possible to edit a comment which you made online;
- It is not possible to access linked reviews via the OLC. It is, however, possible to access the document comparison;
- It is possible to create Bookmarks in the OLC but these will not be uploaded back to the main review when you upload your comments. They will be lost at this stage;
- Public Bookmarks created by others will be visible to you;
- You cannot add attachments to comments using the OLC;
- If a downloaded comment created by another participant has an attachment you will be able to see that there is an attachment on the comment but will not be able to view it.

On leaving the review, you are invited to set your review status and review 'watch' status and enter any summary comments. Note: your review status in the review control panel was automatically set to offline when you downloaded the review. Once the review is uploaded, your status will be set to the selected option.

Having clicked 'OK', you will be taken to the main window.

#### **5.4.1 User Settings Within the OLC**

If you amend your user settings from within the OLC, the amended settings will persist for the same review (i.e. you can enter and leave the review or even close and restart the OLC application itself). However, the changes will not apply to other reviews (even if they are from the same server). Thus user settings when set in the OLC are specific to each review.

When you re-sync the review, the settings will revert back to your "online" settings.

#### **5.4.2 EditZones in the OLC**

If you download a review which contains EditZones you will not be able to make comments or propose changes on the EditZones regardless of their status in the review as the EditZone may have been updated by the time your comments are uploaded. If you are the Contributor assigned to the EditZone you will not have any of the EditZone features (i.e. download, upload) available.

All EditZones in the downloaded review will appear with the same shading as in the online review, however, they will effectively be locked. When navigating by Contents mousing over any paragraph within an EditZone will show a 'no entry' icon and you will be prevented from opening the comment window. Even EditZones that are published for comment cannot be commented on using the OLC.

If you select to navigate by Comments any comments which have already been made on an EditZone will be listed in the navigation pane. If you click on a listed

comment the comment window will open so that you can see existing comments but you will be prevented from making further comments:

**comments on Sample policy document.doc**
Paragraph Id 1.5

Comments

Bookmarks

refresh

enter an optional comment:

You cannot make new comments

paragraph text

For security to be effective, it must start at the top of an organization. It must permeate every level of the hierarchy. Senior management must make decisions on what should be protected, how it should be protected, and to what extent it should be protected. These findings should be crafted into written documents.

Category: 

Minor

Close

Navigate by: << Comments >>

other comments:

☒ Track Changes

**Comment (1) by Sue on 4 Oct 2011 10:47**

Category : Minor **Last Updated: 4 Oct 2011 10:51**

Sue (4 Oct 2011 10:47)

this comment was made online

If you select to navigate by EditZones, all EditZones will be listed in the navigation pane. If you click on a listed EditZone the comment window will open with just the Zones tab available and display summary information about the EditZone.

Note: it is possible that by the time you are ready to upload comments made in the OLC that the review Owner may have assigned an EditZone which includes a paragraph where you have commented. In this instance the upload of the comment(s) will fail, see [EditZones Assigned After Download to OLC](#) for more information.

### 5.4.3 ReviewZones in the OLC

The OLC will respect ReviewZones i.e. if you are a participant and you download a review which has ReviewZones configured, then the permissions will be respected in the OLC. See [ReviewZones](#) for more information on ReviewZone permissions.

## 5.5 Upload

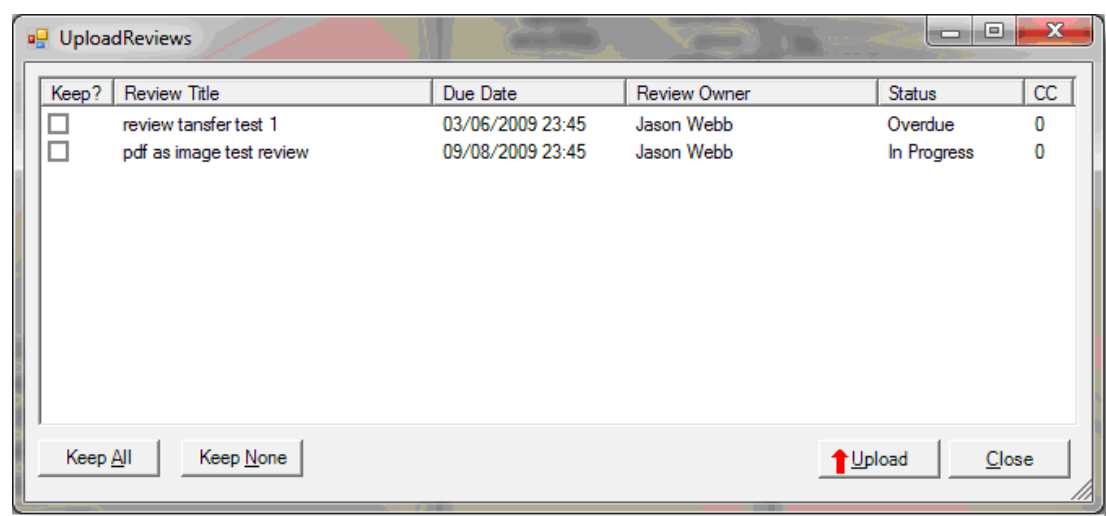
Using the upload functionality you return comments to the server and automatically remove the review from the OLC. If you have multiple servers set up (see [Multiple Servers and Other Options](#)), ensure that you have the correct server selected. The selected server is shown in the server selection panel and in the bottom right hand corner.

Clicking the upload button will open the upload selector.



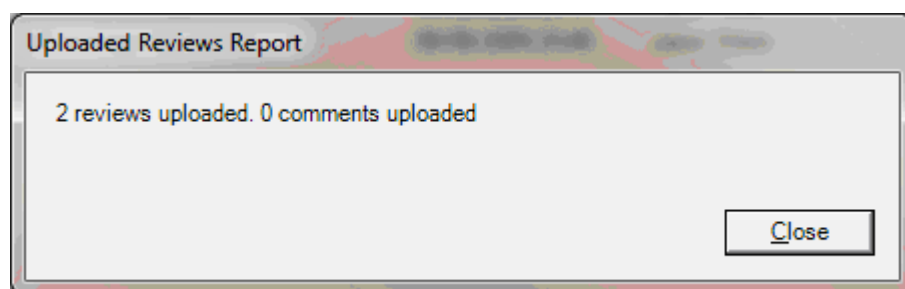
All reviews on the OLC will be shown in the upload selector. All reviews will be automatically uploaded and deleted from the OLC unless you select 'Keep'.

In selecting the 'Keep' checkbox, the review will be updated. Any comments you have made which have not been uploaded (i.e. are shown in the CC field) will be uploaded, and the entire review will be automatically downloaded again.



If you do not check the 'Keep' box, the reviews will be removed from the OLC regardless of whether you have commented upon them or not.

You will receive a confirmation that the upload has been successful.



The window will be refreshed, with non-kept reviews disappearing. It can now be closed.

The comments you made will be added to the main review on the server with the date and time of the comment being shown as the upload date/time.

Please note: If the Review Owner has deleted the review but it is still in the recycle bin (if enabled) the OLC will still successfully upload comments. The Review Owner will get the standard watching email notification if watching the review.

### 5.5.1 Upload Errors

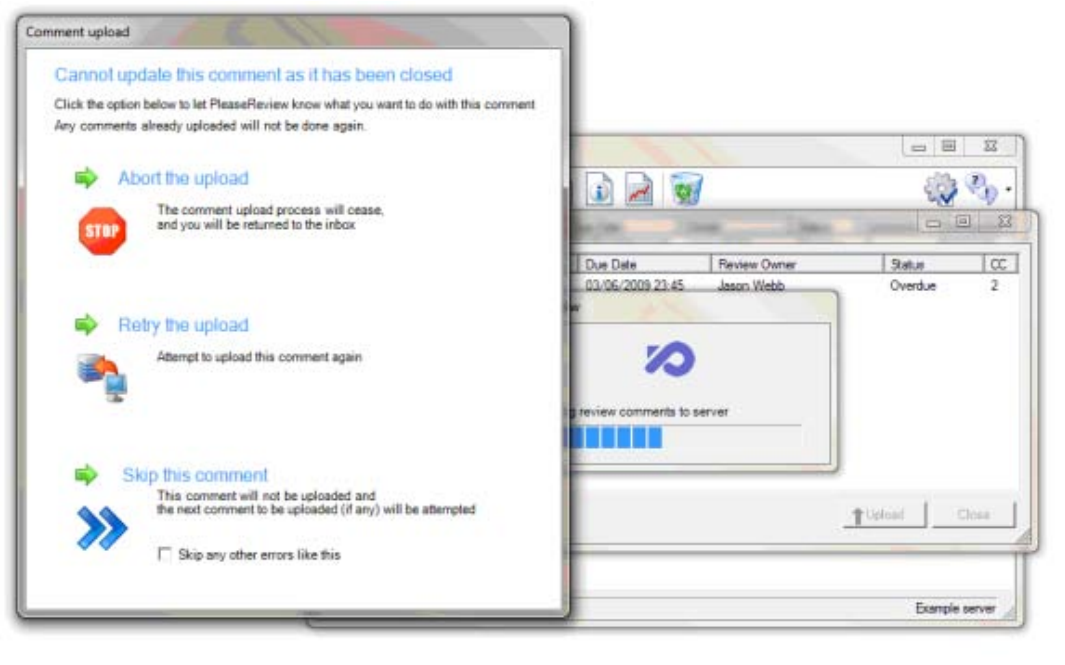
There are five types of upload error you may encounter:

- Closed comments;
- Closed reviews;
- New EditZones assigned;
- Closed review has been re-opened;
- General connectivity issues.

These are addressed below.

#### 5.5.1.1 Comments & Changes Closed After Download to OLC

There is the possibility that a review owner has closed a comment or proposed change to which you have replied or that the comment/change has been deleted. In this event the OLC will note the error and warn you.



Action	Description
Abort	Aborts the upload. Any comment or change already uploaded will remain uploaded but no additional attempt will be made to upload further comments or changes.
Retry the upload	Attempts again to upload the comment that just failed. This potentially allows you to contact the review owner and/or an author and ask them to reopen the comment.
Skip this comment	The current comment is marked as being in error and the next comment is tried. If you select the "Skip any other errors like this" check box, any other closed/deleted comments errors are not shown again, but the comments

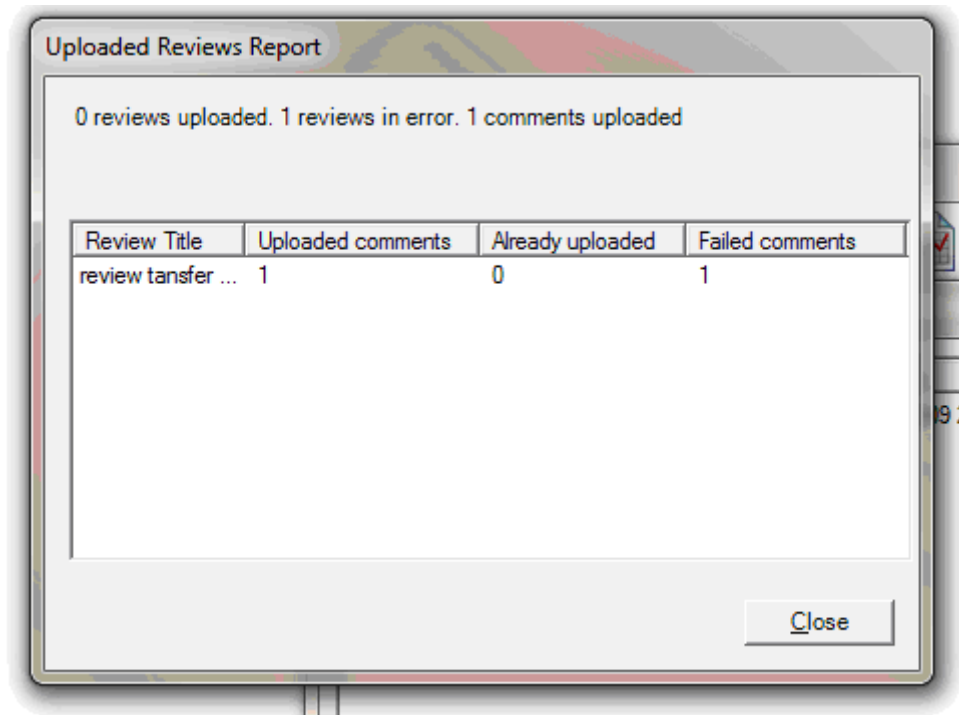


are marked as being in error on the upload report.

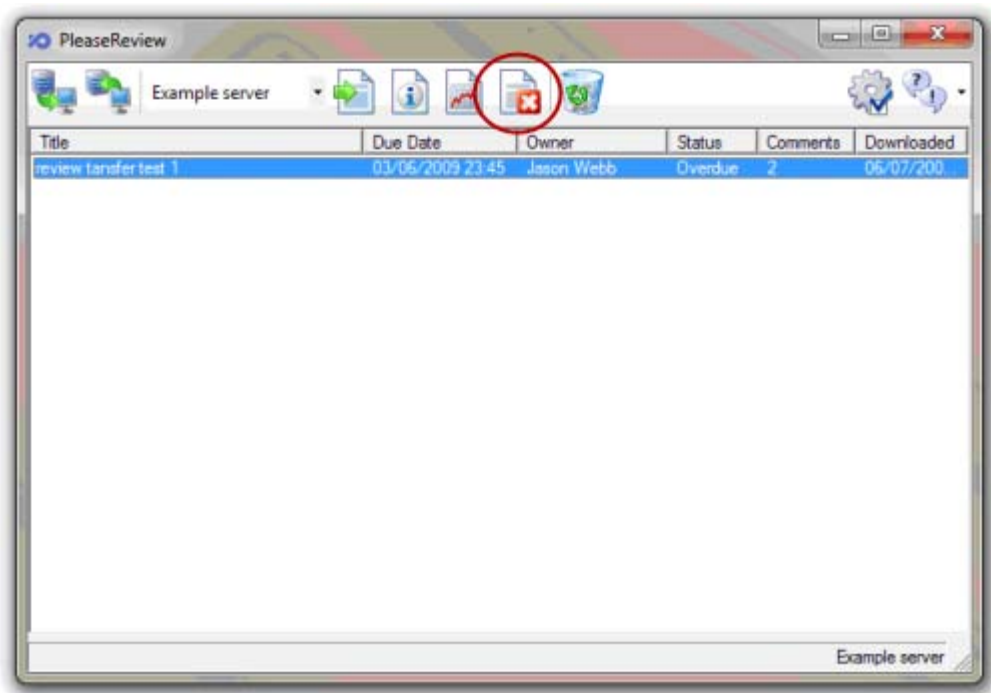
Note: Any serious (hard errors) such as a network or a server fail are not skipped.

Regardless of the action selected the next step will be the uploaded reviews report which confirms the number of failed comments.

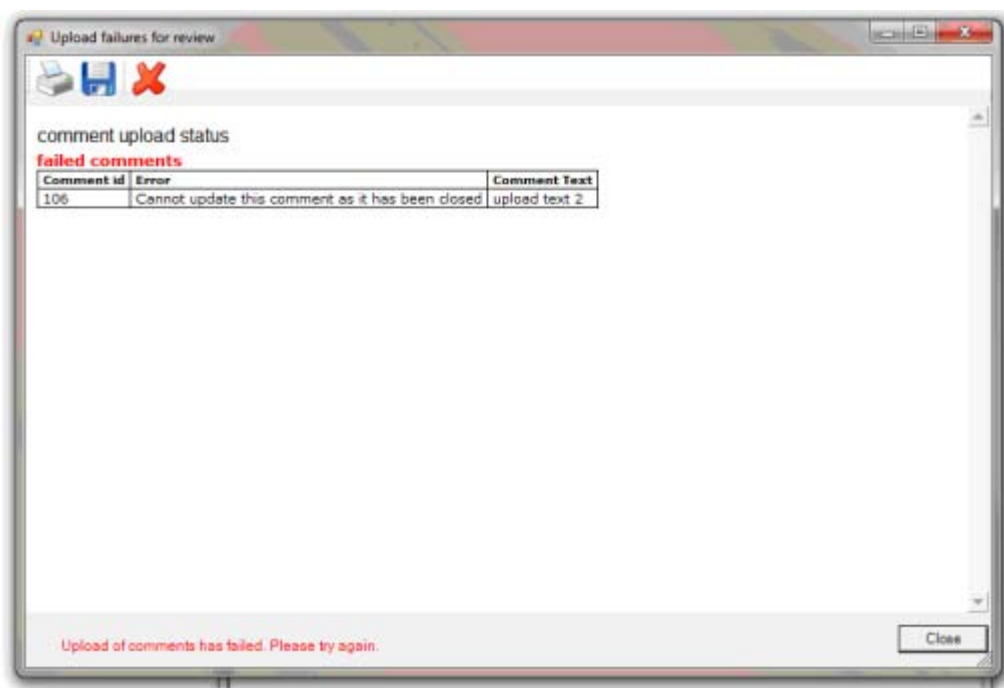
Note: The OLC keeps a list for each review of the comments it has uploaded. These comments will never be uploaded again.



Once you click 'close', the main review management window will list the failed reviews (or all reviews not uploaded if there were multiple reviews and the process was aborted). Selecting a failed review will highlight the error icon on the top toolbar.



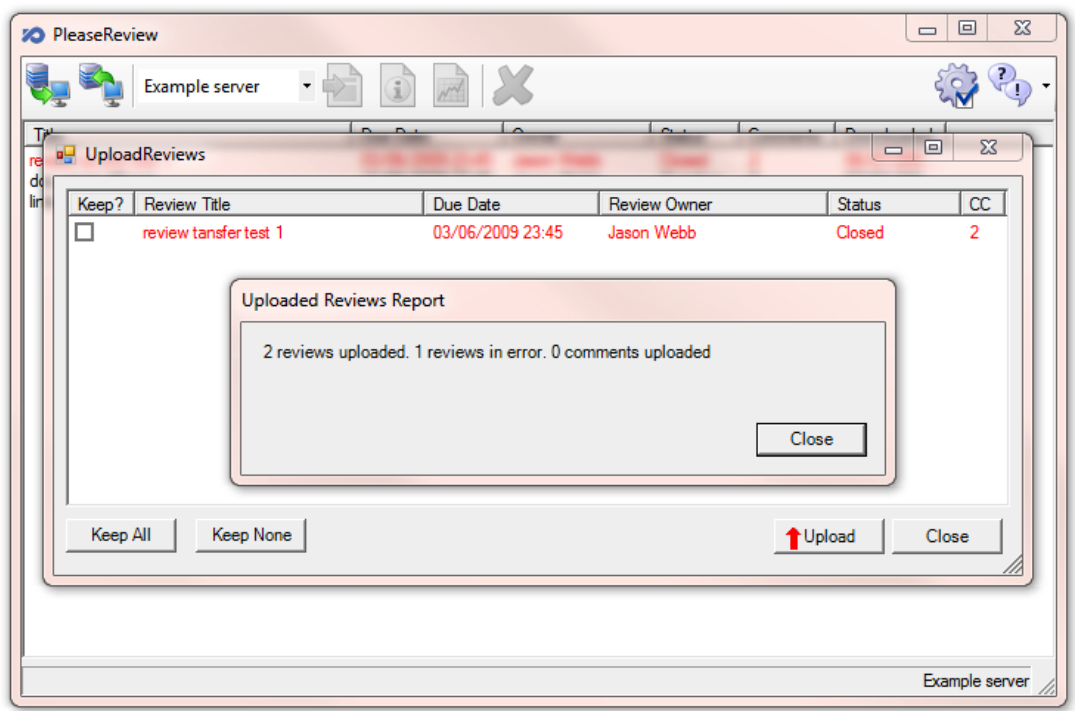
Selecting the error icon will open the error report which contains more detail.



To rectify the situation, re-enter the review, delete the appropriate comment(s) and re-upload the review. The comments can be notified to the review owner by email or another appropriate means.

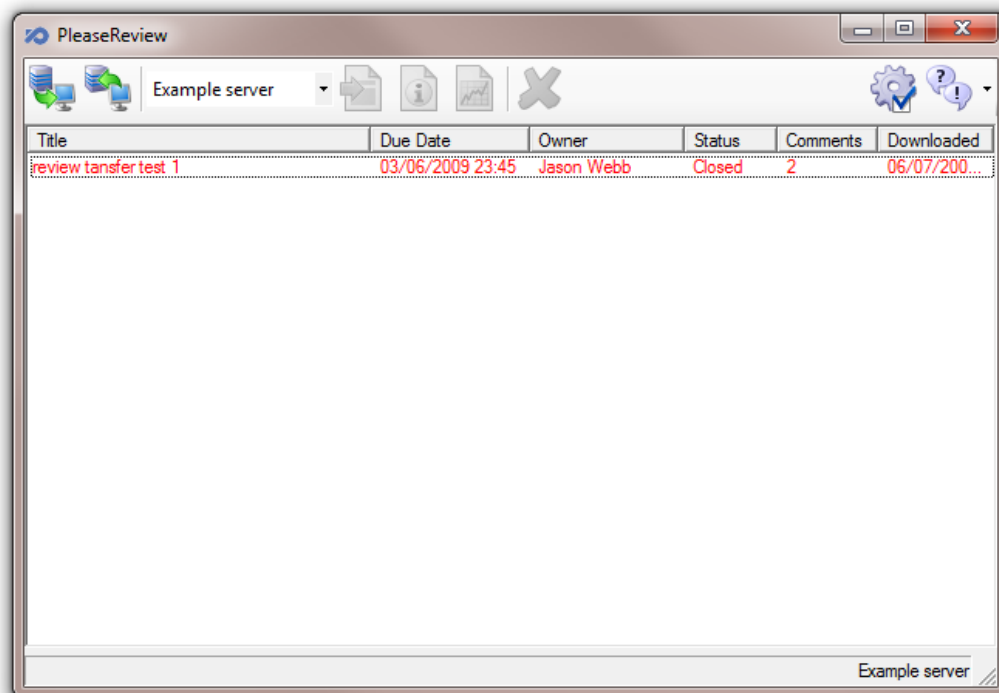
#### **5.5.1.2 Review Closed After Download to OLC**

There is the possibility that a review owner has closed or completed a review to new comments and you have yet to upload your comments. In this event the OLC will note the error and warn you.



Clicking 'Close' on the uploaded reviews report will close the report notification and the upload reviews window, leaving the inbox with the review in error (as shown below).

Note: the review(s) not in error will be uploaded in the normal manner. The review in error will be retained in the OLC and will appear in red text and the comment upload summary will note the number of reviews in error.



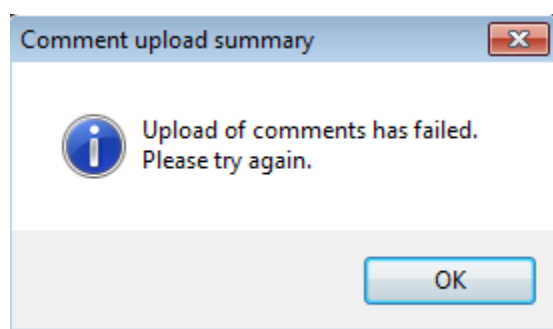
Selecting the review will activate the grayed out icons. Clicking on the error icon will simply activate a notification of the issue.



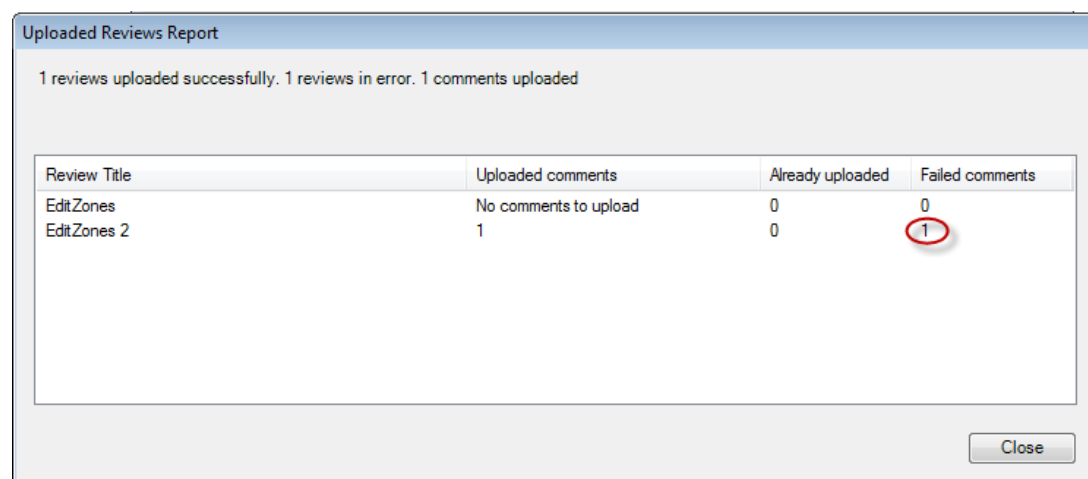
If you wish to preserve your comments on the review and ensure that the review Owner has sight of them, it is recommended that you open the review report (using the 'Report' icon) and save the report using the 'Save as' button. You can save the report as standard html or as 'Web Archive, single file'. This file can then be emailed to the review owner as a separate manual operation.

#### 5.5.1.3 EditZones Assigned After Download to OLC

It is possible that the review Owner may assign new EditZones in the review after you have downloaded it to the OLC. If you make a comment on a paragraph which is subsequently included in an EditZone the uploading of your comments from the OLC will fail. In this instance you will see the following warning:



Clicking OK will display the Uploaded Reviews Report:



Once you click 'close', the main review management window will list the failed reviews (or all reviews if some were 'kept'). Selecting a failed review will highlight the error icon on the top toolbar.



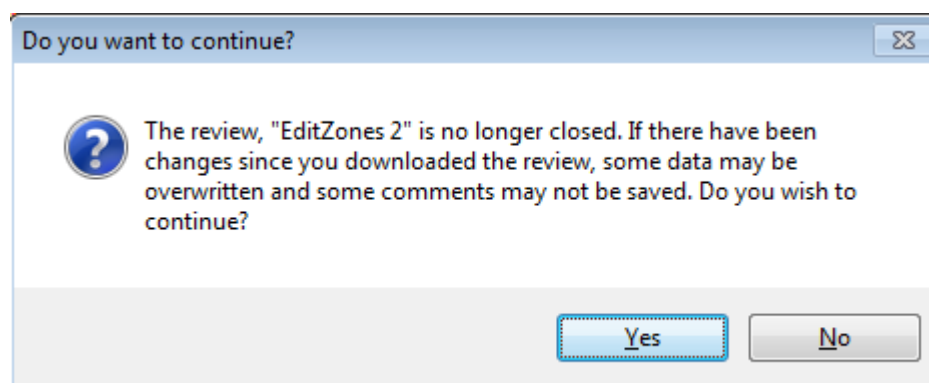
Selecting the error icon will open the error report which contains more detail.



To rectify the situation you can re-enter the review, delete the appropriate comment(s) and re-upload the review. The comments can be notified to the review owner by email or another appropriate means.

#### 5.5.1.4 Closed Review Re-Opened After Download to OLC

It is possible that the review Owner may have re-opened the review since it was downloaded into the OLC. If this is the case when you attempt to upload the review you will see the following warning:



If you continue you will be notified if any comments fail to upload. You can then access the error report as described in the previous section to see which comments are affected.

#### 5.5.1.5 General Connectivity Issues

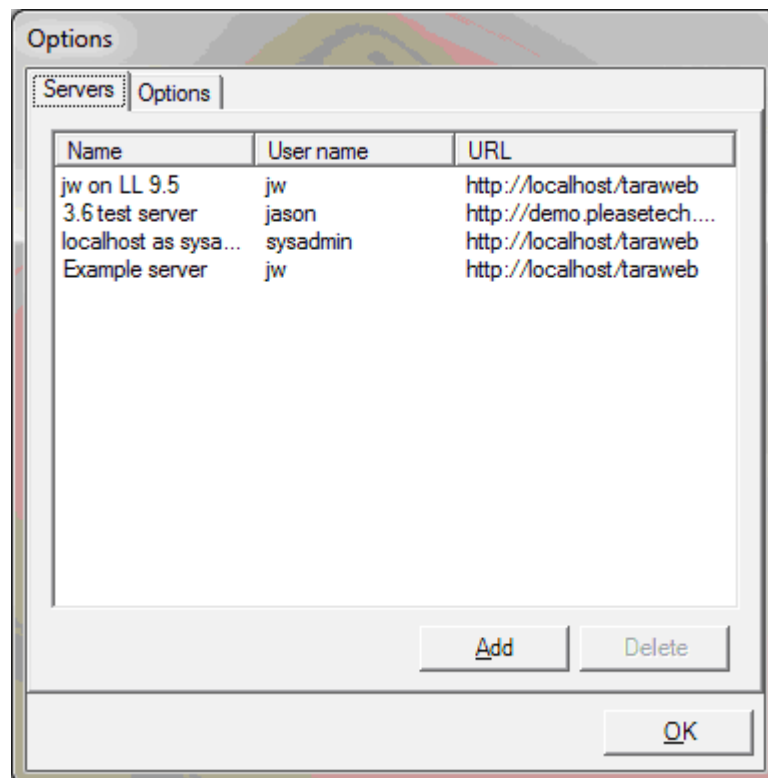
If you have a general connectivity issue you will need to contact support. You may be asked to provide the log file (see [Help and Log Files](#)).

## 5.6 Multiple Servers and Other Options

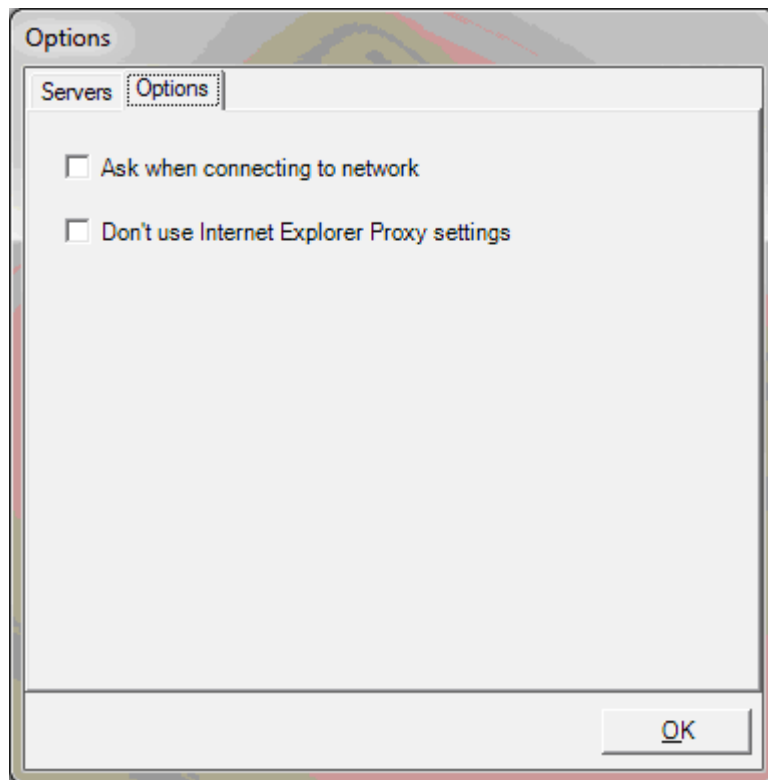
The OLC has the capability of working with multiple PleaseReview servers. In the event that you have multiple servers defined (under options), you will have a server selector appear on the inbox to the right of the upload/download icons.

All actions and displays in the OLC are selected server-specific. Therefore, the list of reviews in the OLC in-box is solely for the server selected. Uploads and downloads are likewise server-specific.

The 'Options' icon gives you the ability to add servers and set other options. The 'Servers' tab allows the addition/deletion of servers. Simply follow the server set-up wizard, or select the server and delete it.



The 'Options' tab allows the setting of two connectivity options as described below:



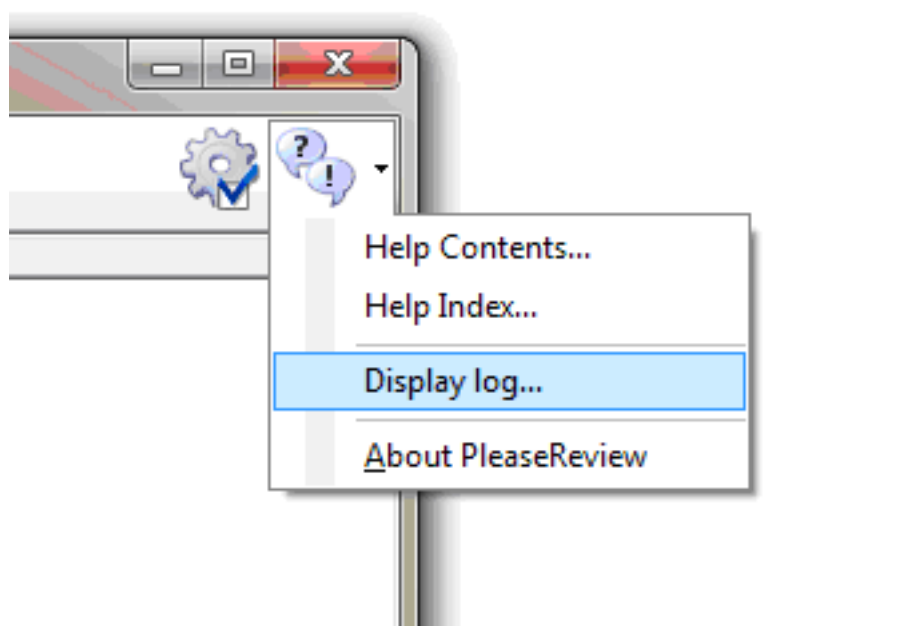
**Ask when connecting to network:** This will ask the user if they wish to proceed when they ask the OLC to perform an action that would require a network connection. Normally used if the user is on a slow or costly connection like a mobile phone.

**Don't use Internet Explorer Proxy settings:** This option stops the OLC from using the same route to the Internet as MS Internet Explorer (IE). The OLC will attempt to directly connect to any servers listed, rather than use any IE-defined web-proxies. This is only required if the user is having problems talking to the PleaseReview server and should only be selected after consultation with support personnel.

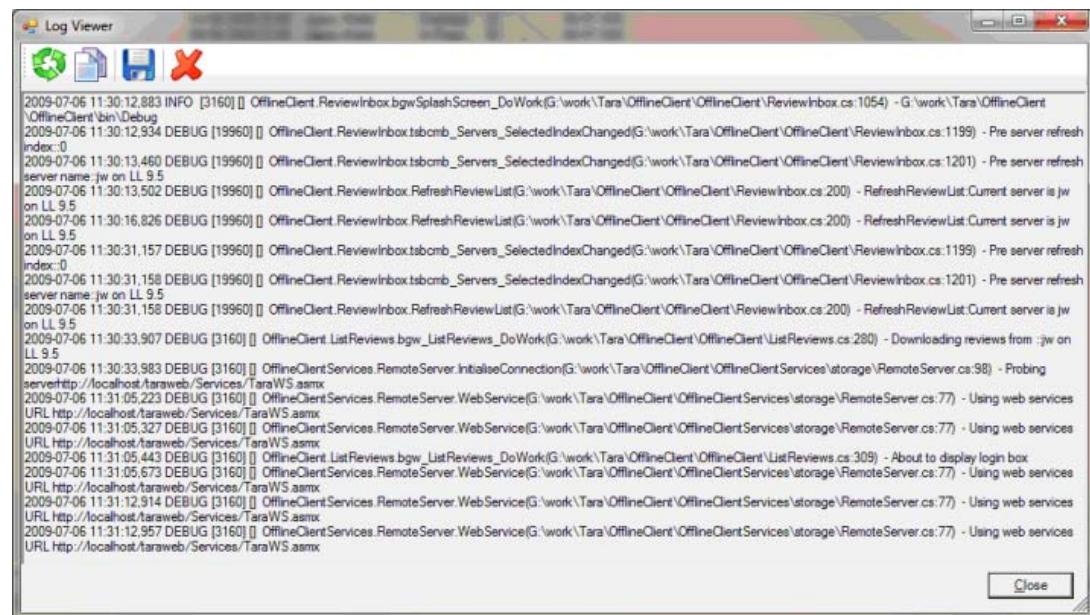
### **5.7 Help and Log Files**

The Help option offers access to the help and to the log file which may be required for connectivity purposes.





The display log option displays the OLC log file for trouble shooting purposes.



The icons (from left to right) allow you to:

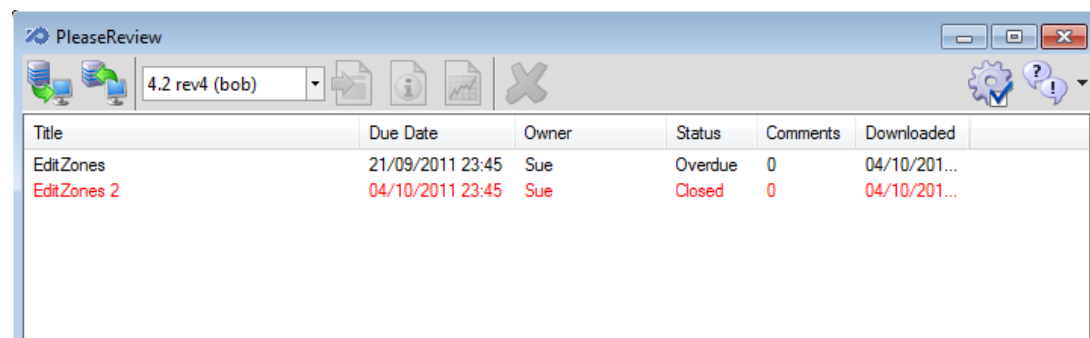
- Refresh the log;
- Copy the contents to the clipboard for pasting into an email or other location;
- Save the file as a .log file to a known location;
- Delete the log.

## 5.8 Using the OLC as an Author/Owner

If you are an Author or review Owner you can download any reviews which are available for offline review with a status of 'In Progress' or 'Closed'.

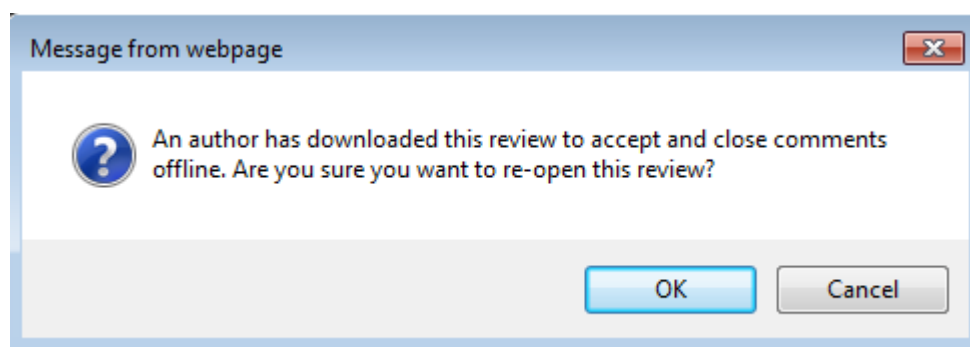
However, for reviews which are 'In Progress' the ability to accept and close comments/changes will not be available. If the review is 'Closed' then you will be able to accept and close comments/changes, although you cannot merge proposed changes.

Closed reviews will be highlighted in red in both the List Reviews screen and the main OLC window:



For more information on accepting and closing comments and proposed changes see [Authors – Accepting and Closing Comments](#).

If the review Owner attempts to re-open a closed review online whilst any Author has their participant status set to offline, the system will display a warning message:



If the Owner continues and re-opens the review, the Author that has the review downloaded will get a warning when they attempt to upload their comments. See [Closed Review Re-Opened After Download to OLC](#) for more information.

## 6 Contributors – Working with EditZones

### 6.1 Introduction

EditZones are applicable to Word documents only and are areas of the Word document that the review Owner has identified as being editable for the nominated Contributor(s). A Super-Contributor can work anywhere in the document, see [Super-Contributor Role](#).

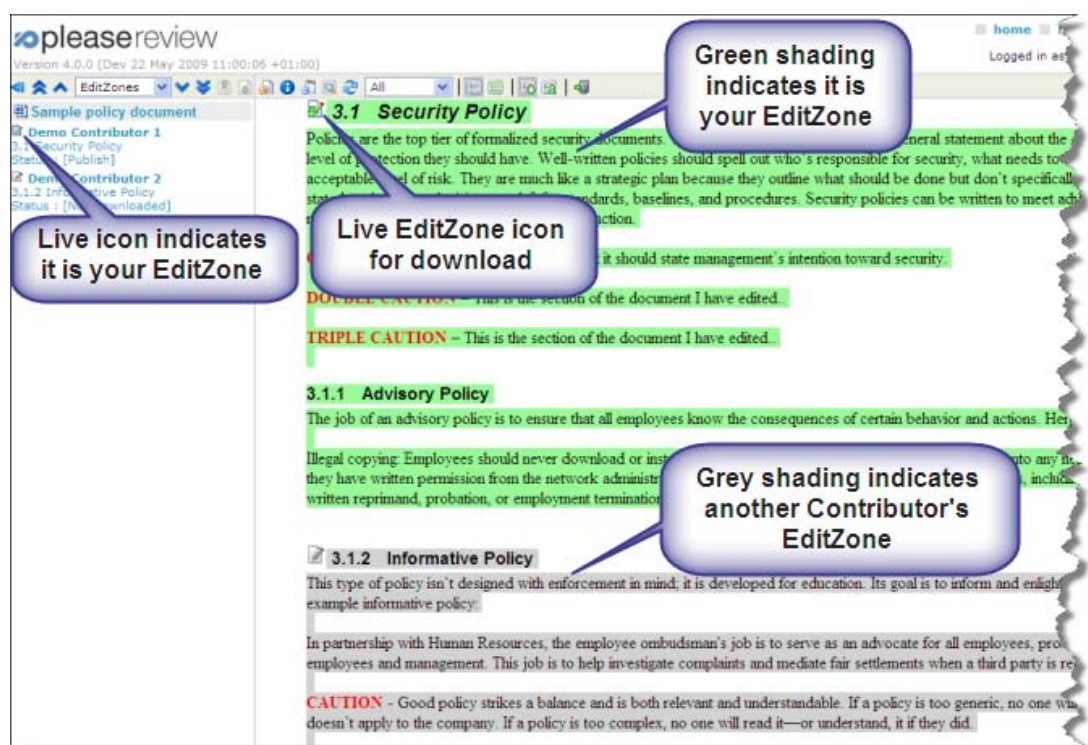
An EditZone is at least a single paragraph and at most the whole document. As a Contributor, once you have been allocated an EditZone, you are able to open that area of the document in Word and edit it. There are no constraints and all Word functionality is available.

Note: PleaseReview has an optional MS Word plug-in which may be used in conjunction with EditZones to create a seamless (i.e. no download/upload) edit experience. However, there is a 'zero foot print' option and the Word plug-in is not mandatory. This section covers use of EditZones both with and without the Word plug-in.

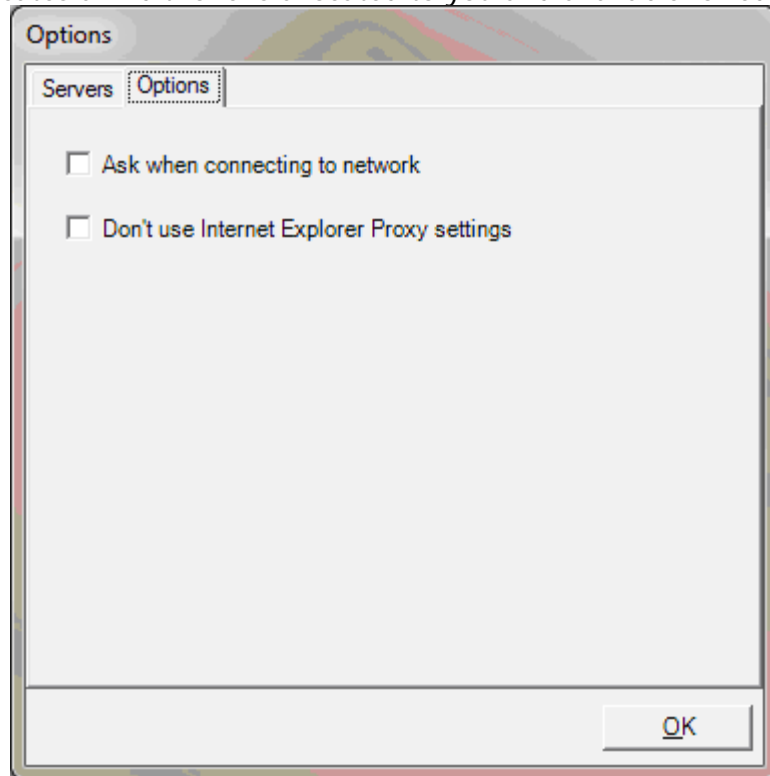
As a Contributor you can only edit an EditZone if an EditZone is allocated to you. If multiple Contributors have been assigned to the same EditZone only one Contributor can download it at a time.

### 6.2 EditZones in the Document

By default, EditZones are identified by background shading of the text. The shading also denotes the EditZone's status. The colors are system-configurable and the shading can even be removed completely. This document uses the default colors; it is possible the colors on your system may be different or removed altogether.



Green shading indicates an EditZone is allocated to you and available for editing.



The EditZone icon ( ) is also live rather than grayed out.

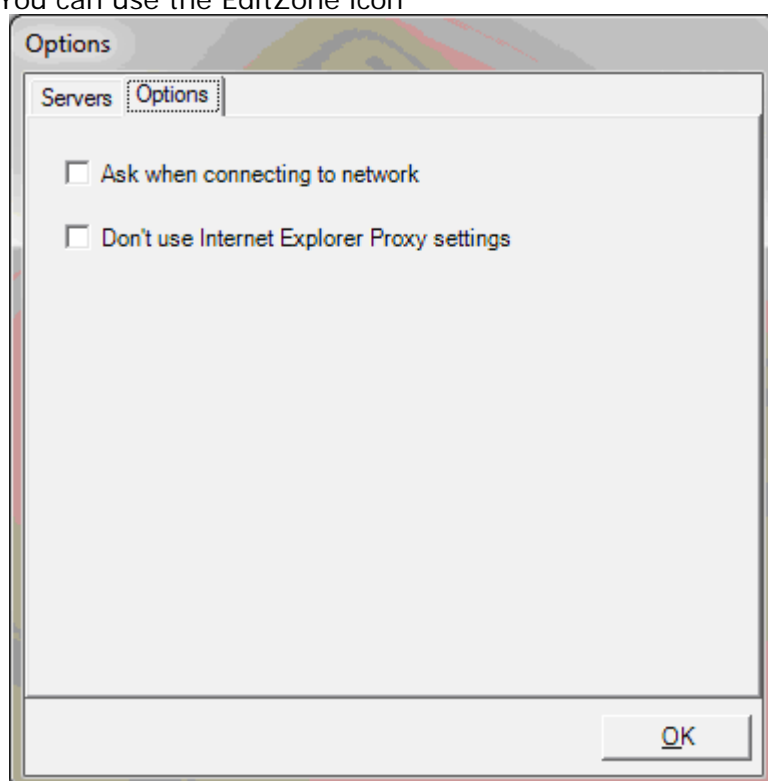
### **6.3 Downloading the EditZone**

In order to edit the document, the EditZone needs to be downloaded to your computer and edited in Microsoft Word. There are two options to download the EditZone, which are described below.

When downloaded you will only have the section of the document defined as the EditZone in Word. You will not have the whole Word document.

### 6.3.1 Downloading the EditZone Using the Icon

You can use the EditZone icon



( ) to download the document. Clicking on it opens the standard browser download dialog and you can then either open the document or save it. Note: If using inline editing or the paragraph toolbar, the download option will be on the paragraph toolbar.

Whether you choose to open the document directly or save it to a known location, the EditZone will be downloaded complete with any Reviewers' comments. The behavior of these comments will be as for the review Owner download. No 'Closed' comments will be included. All 'Open' and 'Accepted' comments and changes will be included. The behavior of the PleaseReview comments and changes in Word is detailed below:

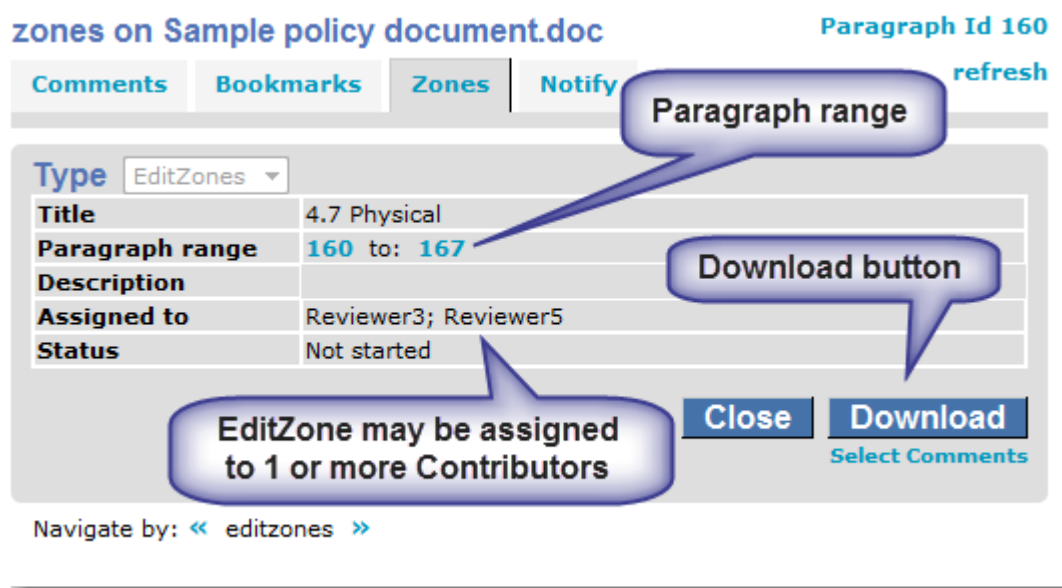
PleaseReview	Word
Comment	Standard Word comment
'Accepted' Proposed Change	Inserted text to underlying paragraph style
'Open' Proposed Change	Standard Word 'tracked change'

For more detail see [Retrieving Comments](#).

### 6.3.2 Downloading the EditZone via the Download Dialog

Clicking on any paragraph in the EditZone will open the comment window/pane with the 'Zones' tab selected (if navigating by EditZones). If not navigating by EditZones you will need to select the 'Zones' tab.

The tab shows general information on the EditZone and has a 'Download' button. This downloads the EditZone and will deliver the standard browser download dialog and you can then either open the document or save it.



The 'Select Comments' link below the Download button allows you to select which Reviewer's comments are included in the download and how they behave. The behavior of this functionality is identical to the review Owner's download option via the review close-out dialog, see [Retrieving Comments](#).

If the EditZone has been assigned to multiple Contributors it can only be downloaded by one Contributor at a time. Once downloaded, the EditZone will be marked as assigned to that Contributor only until it is published, all Contributors will then be listed once again.

### 6.3.3 Cancelling a Download

To cancel a download open the comment window/pane (by clicking on any paragraph in the EditZone) go to the 'Zones' tab and select 'Reset'. This will cancel the download and return the EditZone to the previously published revision.

### 6.4 Working with the Downloaded EditZone

The downloaded EditZone, whether opened directly or saved to disk and subsequently opened, is simply a Word document and you are able to edit the document as required using all of the Word tools. There are, however, some limitations and things to note which are detailed below:

- You will not be able to include links or insert cross references to parts of the document that are not in your EditZone;
- Depending on various factors, your Word document may or may not include headers and footers. If you edit headers and footers, this may affect them in other parts of the document. There is more information in the [Working with EditZones](#) section;
- If your Word document has an OLE Embedded Object (such as a spreadsheet), the object will be available in the downloaded EditZone. However, any changes to the embedded object will not be saved back when the edited Word document is uploaded to update the EditZone;
- It is possible to insert Word Heading levels. However, if you add a new heading level which is equal to or higher than the highest level in your

EditZone, there will be an impact on the master document. There is more information in the [Working with EditZones](#) section;

- There are certain limitations with bulleted listings and numbering. There is more information in the [Working with EditZones](#) section.

### **6.5 Uploading the Edited EditZone**

It is necessary to upload the edited Word document to update the EditZone. It is possible to do this from a file saved to disk through the PleaseReview interface or via a PleaseReview Word plug-in.

When uploading (from either method) you will have three options:

<b>Action</b>	<b>Description</b>
Save	This action saves the file to the server. It does not update the information in the EditZone in the review – it is treating the server as a hard disk location. It is possible to download the most recently saved instance from PleaseReview.
Revise	This action saves the file to the server and updates the document in the EditZone in the review but does not make the new text available for review. It is the equivalent of a 'progress to date'. Thus participants can see the updated text but the EditZone remains locked for editing and participants cannot make comments on the text.
Publish	This action saves the file to the server and updates the document in the EditZone in the review, and makes the EditZone available for review. It also triggers any automatic email notifications that the EditZone is available. The email notifications are scheduled by the review Owner when setting up the review.

#### **6.5.1 Uploading from a Document Saved to Disk**

Once an EditZone has been downloaded, a 'contributor upload' area appears in the comment window/pane.



Zones
refresh

---

Type
EditZones ▾

Title	4.5 Security Controls
Paragraph range	145 to: 156
Description	
Assigned to	Reviewer3
Status	In progress

Close
Download
Select Comments

Navigate by: << editzones >>

contributor upload

Upload EditZone File  
 Action

Save ▾

Browse...
Upload

This upload capability allows you to select the revised Word document containing the revision to the EditZone and upload it. The drop-down box allows the selection of the EditZone status.

### 6.5.2 Uploading with the Word Plug-in from Word

If you have the Word plug-in installed, there will be a PleaseReview option in Word. Please see [Word 2003](#) and [Word 2007 and Word 2010](#).

Once you have edited the document you can upload it using the plug-in.

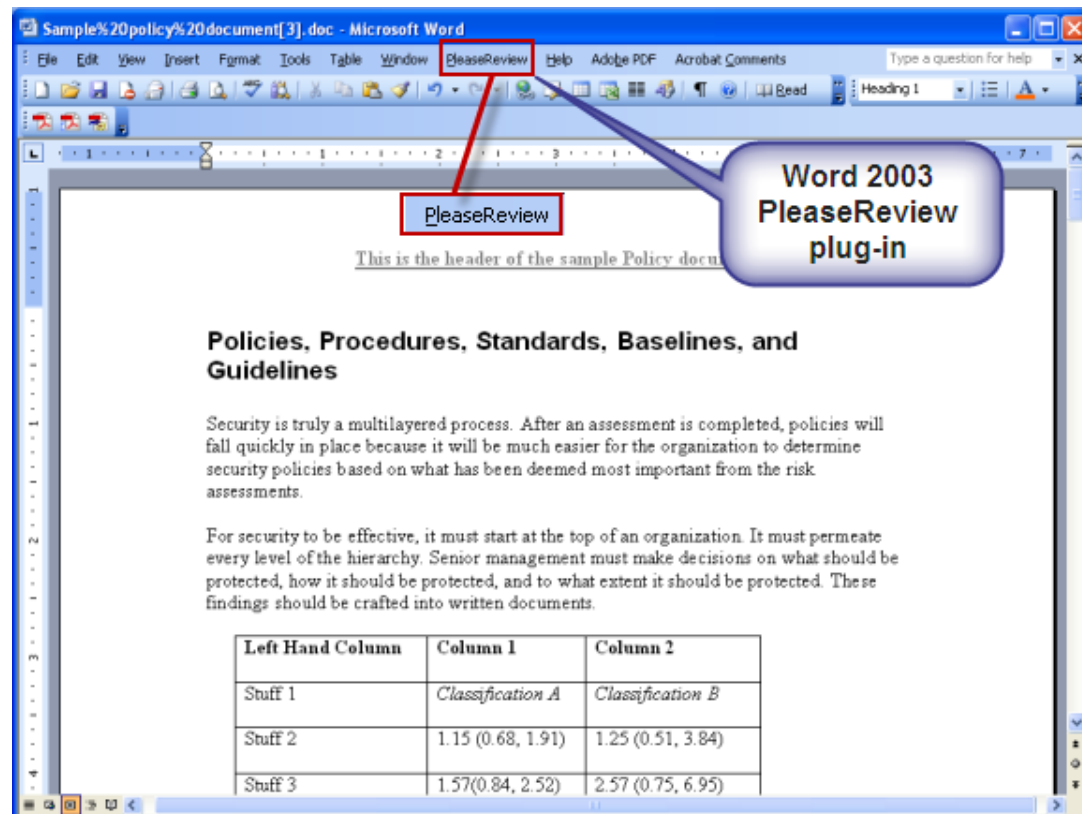
Notes:

- You must upload the original downloaded Word document using the Word plug-in. It will not work with a different (e.g. template) document which should be uploaded using the method described above;

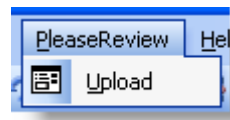
However, copying and pasting template information into the downloaded document is supported. You can also save it to disk, re-open it, and then upload it using the plug-in;

- If the upload is 'Save' or 'Revise', the document will remain open in Word for further work. If the upload is 'Publish', the document will be closed;
- If there are any Word comments or tracked changes in the document (whether they are originally from PleaseReview or not), a warning will appear that they will not be handled properly in PleaseReview. See [Uploading a Document with Existing Comments/Track Changes](#) for more information.

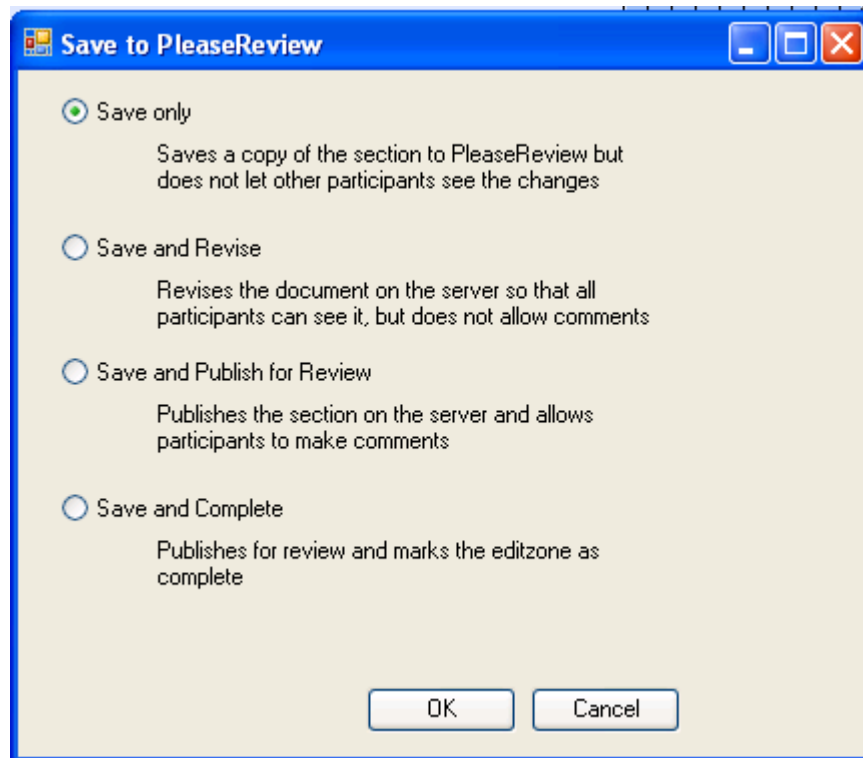
### 6.5.2.1 Word 2003



Select the plug-in menu item and then 'Upload'.

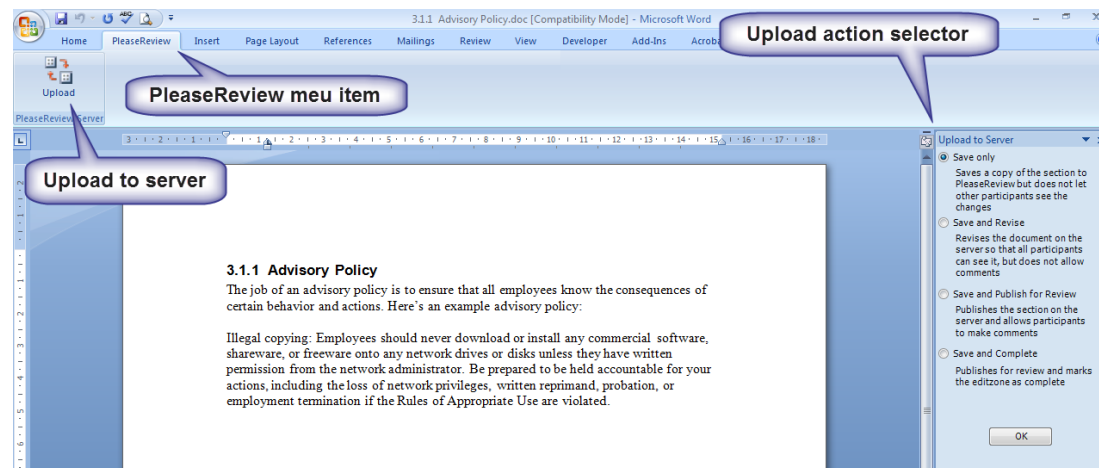


This pops open a new dialog showing the available upload actions:



Select the appropriate option and then 'OK'.

### 6.5.2.2 Word 2007 and Word 2010



### 6.5.3 EditZone Revisions

Each revision to an EditZone is recorded in two places: on the Zones tab (as shown below) and on the EditZone history screen available from the Review Control Panel.

In the example below it can be seen that the Contributor has revised the EditZone twice, currently has the zone downloaded and has undertaken a 'save'.

Having undertaken a save there are four options available:

Action	Description
Publish	This action publishes the currently saved revision making it available for comment.
Revise	This action revises the currently saved revision updating the appearance in the browser (with the saved version) but leaving the EditZone locked.
Delete	This action deletes the saved revision.
Download	This action provides the saved revision for download for further editing.

**zones on Sample policy document.doc**
Paragraph Id 160

[Comments](#)
[Bookmarks](#)
[Zones](#)
[Notify](#)
refresh

**Type** EditZones ▾

<b>Title</b>	4.7 Physical
<b>Paragraph range</b>	160 to: 167
<b>Description</b>	
<b>Assigned to</b>	Reviewer3
<b>Status</b>	In Progress - version 2 published

Close
Download
Select Comments

Navigate by: << editzones >>

**contributor upload**

Upload EditZone File
 
Browse...
Upload

Action
 Save ▾

**editzone history**

Ver 3	Save	21 Sep 2011 11:03	<a href="#">Publish</a>	<a href="#">Revise</a>	<a href="#">Delete</a>
Ver 2	Publish	21 Sep 2011 11:02			<a href="#">Download</a>
Ver 1	Publish	21 Sep 2011 11:01			

Having undertaken a 'revise', the Contributor can 'Publish' the currently saved revision to open it for commenting, as shown below.

editzone history			
Ver 3	Revise	21 Sep 2011 11:08	<a href="#">Publish</a>
Ver 2	Publish	21 Sep 2011 11:02	
Ver 1	Publish	21 Sep 2011 11:01	

Having undertaken a 'Publish', the Contributor has the option to 'Undo-Publish' or 'Complete'.

'Undo-Publish' returns the EditZone as it is currently displayed to a 'Revise' status thus preventing comments. It does not remove the update from the browser.

'Complete' removes the EditZone from the document and there is no longer any indication that an EditZone existed in the document. The EditZone history section will no longer be available in the Zones tab but information will be stored in the EditZone History available via the review control panel.

Completing an EditZone allows that portion of the document to be re-assigned into a further EditZone.

editzone history			
Ver 3	Publish	29 Sep 2011 11:45	<a href="#">Complete</a> <a href="#">Undo-Publish</a>
Ver 2	Publish	29 Sep 2011 11:36	
Ver 1	Publish	29 Sep 2011 11:21	

## 6.6 Super-Contributor Role

A Super-Contributor has the permissions of an Author and Contributor combined within a review. So are able to accept and close comments made by any participant and have EditZones assigned to them by the review Owner. The review Owner is automatically a Super-Contributor if they have an Author-Contributor role in the review.

Super-Contributors are also able to assign EditZones to themselves anywhere in the document (as long as it is available) and open any paragraph directly in Word for editing if they are using the paragraph toolbar.

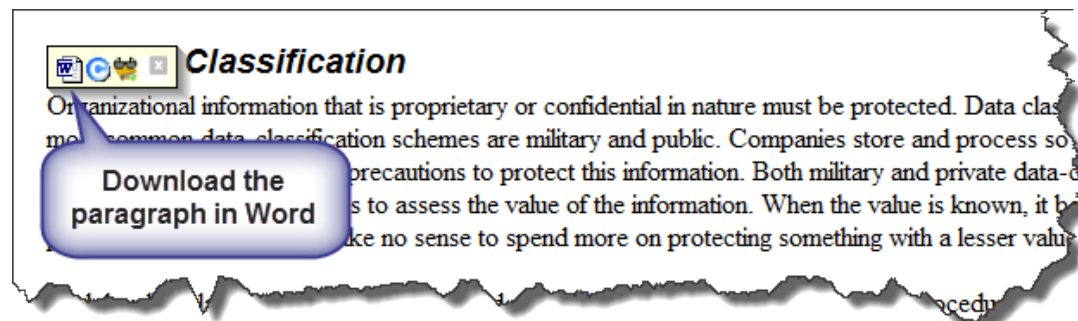
### 6.6.1 Assigning EditZones

At the Zones tab in the comment window the Super-Contributor is able to assign EditZones to themselves but they will not be able to assign EditZones to anyone else. All other rules pertaining to assigning EditZones from the comment window are the same as for the review Owner. See [Creating EditZones](#) for more information.

### 6.6.2 Download Paragraphs

If the Super-Contributor has their 'Inline editing and paragraph toolbar' preferences set to 'Use Inline Editing' or 'Toolbar Only', they will be able to open any paragraph directly in Word for editing. This functionality is designed to be used with the PleaseReview Word plug-in, making it quick and easy for a Super-Contributor to open a paragraph in Word, edit it and then 'save and complete' from within Word to update the document being reviewed. All such actions are, of course, audited. For more information on the Word plug-in see [Uploading with the Word Plug-in from Word](#).

The paragraph toolbar has an icon for opening the paragraph directly in Word:



Once downloaded, the paragraph will be 'locked' to other participants, just as for normal EditZones, until the Super-Contributor uploads it again.

## 7 Authors – Accepting and Closing Comments

Participants with the role of 'Author' in a review are able to accept and close comments and changes. Any Author can accept and close any comment in the review.

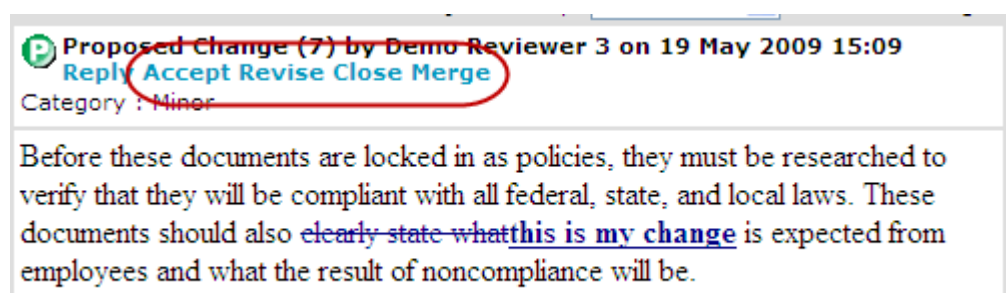
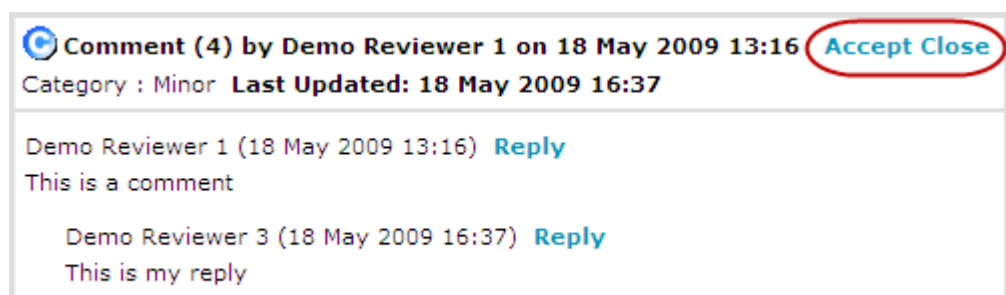
### 7.1 Accepting and Closing Comments

Comments may be accepted and closed whilst the review is 'In Progress' or after the review has been 'Closed' by the review Owner, but not once the review is 'Completed'.

The purpose of accepting and closing is threefold.

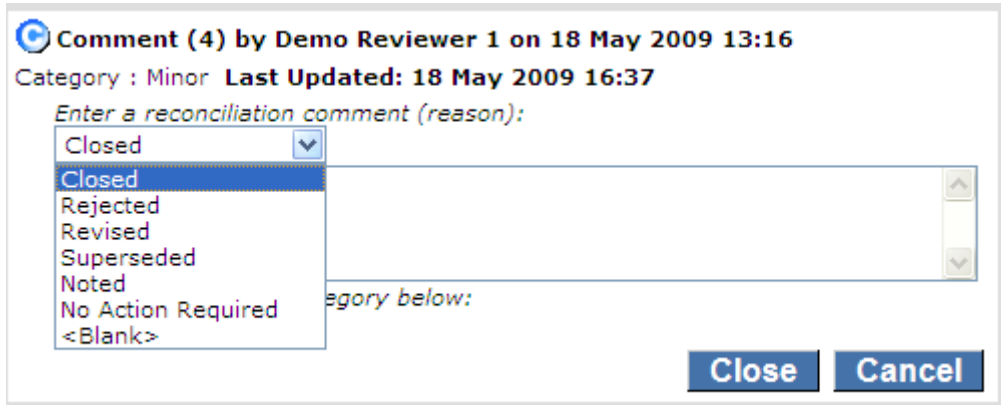
1. It allows a comment or discussion thread to be closed-off in a manner which all Reviewers can see;
2. It provides feedback for the comment reconciliation report;
3. It allows for the control of the behavior of comments and proposed changes when they are included in the resulting Word and PDF document (or report, for other document formats).

To accept/close comments, the Author should enter the review and open the comments window as if making or viewing a comment. In addition to standard functionality available to Reviewers, the Author will have 'Accept' and 'Close' options for each comment and proposed change.



Once accepted or closed, the review Author gets the option to enter a reconciliation comment (i.e. reason). See also [QuickAccept](#).





**Comment (4) by Demo Reviewer 1 on 18 May 2009 13:16**  
 Category : Minor **Last Updated: 18 May 2009 16:37**  
 Enter a reconciliation comment (reason):  
 Closed  
 Rejected  
 Revised  
 Superseded  
 Noted  
 No Action Required  
 <Blank>  
 Category below:  
 Close Cancel

The drop-down list is site-configurable.

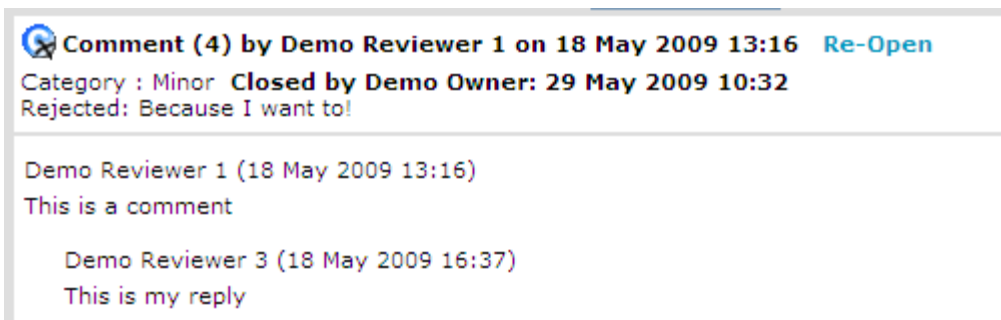


**Comment (4) by Demo Reviewer 1 on 18 May 2009 13:16**  
 Category : Minor **Last Updated: 18 May 2009 16:37**  
 Enter a reconciliation comment (reason):  
 Rejected  
 Because I want to!  
 Select the comment category below:  
 Minor  
 Close Cancel

Demo Reviewer 1 (18 May 2009 13:16)  
 This is a comment

Demo Reviewer 3 (18 May 2009 16:37)  
 This is my reply

Once accepted/closed, the status of the comment is updated and clearly displayed.



**Comment (4) by Demo Reviewer 1 on 18 May 2009 13:16 Re-Open**  
 Category : Minor **Closed by Demo Owner: 29 May 2009 10:32**  
 Rejected: Because I want to!  
 Demo Reviewer 1 (18 May 2009 13:16)  
 This is a comment  
 Demo Reviewer 3 (18 May 2009 16:37)  
 This is my reply

Notes:

- Closing a comment is shown above. Accepting a comment works in the same way;

- Only one proposed change can be accepted per paragraph. If there are multiple proposed changes on the paragraph, accepting one will automatically close the others. For more information, see [Working with Proposed Changes](#);
- If available, the 'Re-Open' option is only available for the most recent comment/change accepted/closed. It is not possible to re-open more than one comment/change.

### 7.1.1 Comment Categorization

If the comment categorization feature is enabled, the Author will be able to re-categorize the comment or proposed change during the accept/close process. This is shown below:

**Comment (4) by Demo Reviewer 1 on 18 May 2009 13:16**  
 Category : Minor Last Updated: 29 May 2009 10:35  
 Enter a reconciliation comment:  
 Accepted  
 Because although its cosmetic...  
 Select the comment category below:  
 Cosmetic  
 Accept Cancel

Demo Reviewer 1 (18 May 2009 13:16)  
 This is a comment

Demo Reviewer 3 (18 May 2009 16:37)  
 This is my reply

**Comment (4) by Demo Reviewer 1 on 18 May 2009 13:16 Re-Open**  
 Category : Cosmetic (Original category : Minor) Accepted by Demo Owner: 29 May 2009 10:37  
 Accepted: Because although its cosmetic not minor we should note it

Demo Reviewer 1 (18 May 2009 13:16)  
 This is a comment

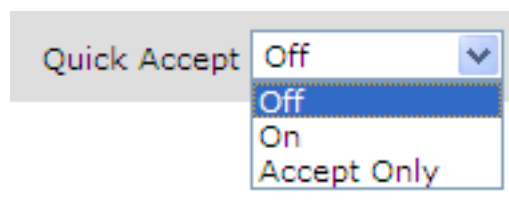
Demo Reviewer 3 (18 May 2009 16:37)  
 This is my reply

### 7.2 QuickAccept

'QuickAccept', if enabled, provides 'one click' accepting/closing of comments and proposed changes. Adjacent to the 'other comments' area is the QuickAccept drop-down box.



The options are shown below:



Selection	Description
Off (or not enabled)	The Author <u>will</u> be prompted for a reason for accepting/closing a comment or proposed change.
On	The Author <u>will not</u> be prompted for a reason for accepting/closing a comment or proposed change.
Accept Only	The Author <u>will</u> be prompted for a reason for closing a comment or proposed change but <u>will not</u> be prompted for a reason for accepting a comment or proposed change.

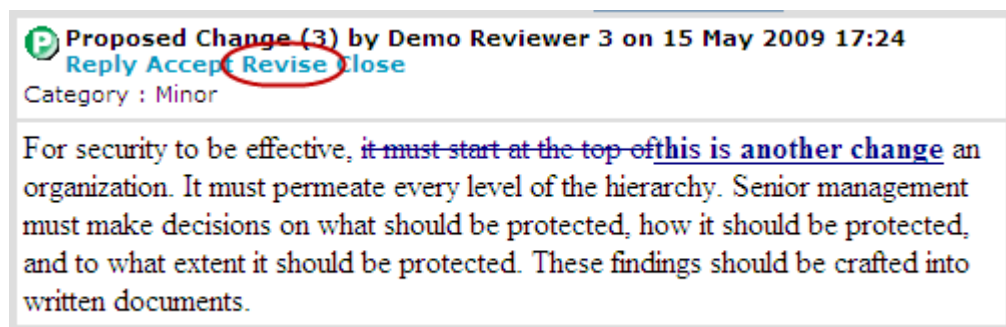
Notes:

- It is possible to turn QuickAccept on/off as required, and therefore the Author can alternate between settings for each comment/change if appropriate;
- The same logic applies to withdrawing a comment. There is no prompt for a withdrawal reason if QuickAccept is on;
- QuickAccept is a system policy setting and thus may be disabled.

### 7.3 Working with Proposed Changes

#### 7.3.1 Editing Proposed Changes

In addition to 'Accept' and 'Close', each proposed change has the option to 'Revise'.



Selecting 'Revise' will permit the Author to edit the proposed change. If the Author applies the edits, PleaseReview automatically closes the original proposed change with an appropriate close reason being given and creates a new proposed change (attributed to the Author) with the revised text. This maintains the integrity of the audit trail.

### 7.3.2 Merging Proposed Changes (Word only)

When a paragraph has multiple proposed changes, the Author will have an additional 'Merge' option in the proposed change actions.



This is shown in context below.



Selecting 'Merge' will open an additional window as shown below. This window displays the merge result, provides a check-box option to select/deselect the inclusion of proposed change/s in the merge, and allows manual editing of the merge result.

The additional 'Merge' window:

**Edit merged text if required**

Font family: [dropdown] | B | I | U | ABC | X | X' | —

Tools: [undo] [redo] [find] [replace] [insert] [delete] [link] [unlink] [image] [table] [list] [indent] [outdent] [bold] [italic] [underline] [font color] [background color]

Policies are the top tier ofmy change documents. These high-level documents offer a general statement about the organization's assets and what level of protection they should have. Well-written and this is my change out who's responsible for security, what needs to be protected, and what is an acceptable level of risk. They are my change is here plan because they outline what should be done but don't specifically dictate how to accomplish the stated goals. Those decisions are left for standards, baselines, and procedures. Security policies can be written to meet advisory, informative, and regulatory needs. Each has a unique role or function.

Select comment category:

**Merge result** Refresh

Policies are the top tier of ~~of formalized security of my change~~ documents. These high-level documents offer a general statement about the organization's assets and what level of protection they should have. Well-written ~~policies should spell out who's responsible for security, what needs to be protected, and what is an acceptable level of risk. They are much like a strategic plan because they outline what should be done but don't specifically dictate how to accomplish the stated goals. Those decisions are left for standards, baselines, and procedures. Security policies can be written to meet advisory, informative, and regulatory needs. Each has a unique role or function.~~ ~~change is here~~ plan because they outline what should be done but don't specifically dictate how to accomplish the stated goals. Those decisions are left for standards, baselines, and procedures. Security policies can be written to meet advisory, informative, and regulatory needs. Each has a unique role or function.

**existing proposed changes**

☒ Proposed Change (19) by Demo Reviewer 4 on 29 May 2009 11:14  
Policies are the top tier of formalized security documents. These high-level documents offer a general statement about the organization's assets and what level of protection they should have. Well-written policies should spell out who's responsible for security, what needs to be protected, and what is an acceptable level of risk. They are much like a strategic plan because they outline what should be done but don't specifically dictate how to accomplish the stated goals. Those decisions are left for standards, baselines, and procedures. Security policies can be written to meet advisory, informative, and regulatory needs. Each has a unique role or function.

☒ Proposed Change (17) by Demo Reviewer 1 on 29 May 2009 11:11  
Policies are the top tier of ~~of formalized security of my change~~ documents. These high-level documents offer a general statement about the organization's assets and what level of protection they should have. Well-written policies should spell out who's responsible for security, what needs to be protected, and what is an acceptable level of risk. They are much like a strategic plan because they outline what should be done but don't specifically dictate how to accomplish the stated goals. Those decisions are left for standards, baselines, and procedures. Security policies can be written to meet advisory, informative, and regulatory needs. Each has a unique role or function.

Apply+Accept OK Cancel

**The merge result which includes all selected proposed changes**

**Tracked changes view of the merge result above**

**Checked changes are included in the merge result above**

#### Notes:

- If there is a conflict between merges (i.e. Proposed Change 1 overlaps Proposed Change 2) then PleaseReview will not attempt to resolve the conflicting paragraphs. The most recent change will be selected. The Author can include either of the conflicting paragraphs in the merge result (using the select/deselect check-box) and then manually edit additional changes in the edit box;
- The Author may edit the merge result. Clicking on the 'Refresh' button will always update the tracked changes view of the merge result.



The operation of the merge window buttons is as follows:

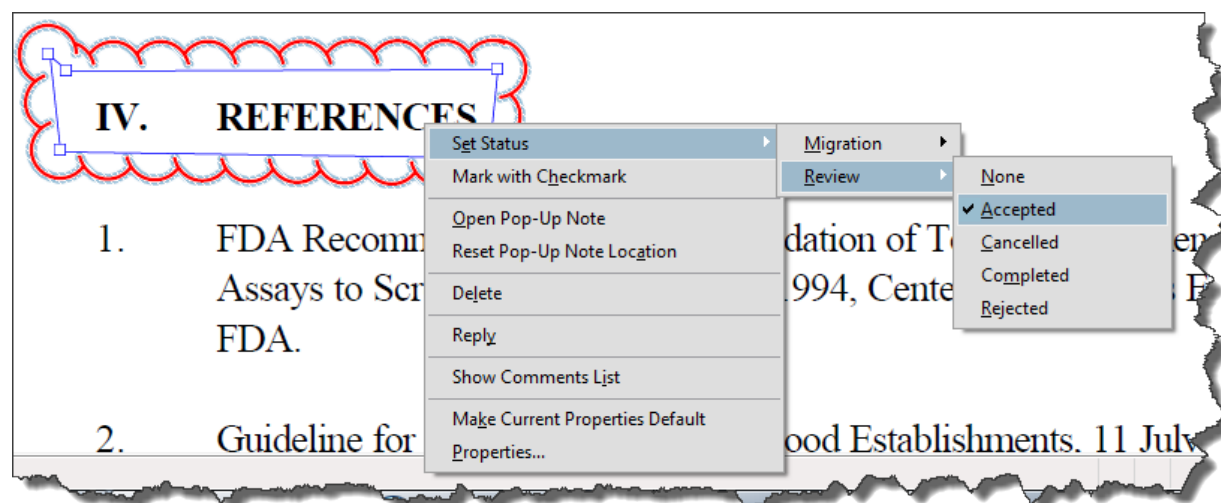
Button	Result
Refresh	Includes manual edits in the merge result.
OK	Applies the changes into a new merged proposed change, attributed to the Author, and leaves this resulting new proposed change 'Open'. This means: <ul style="list-style-type: none"> <li>• All other proposed changes included in the merge are closed with the comment "Merged: This change was merged into another one";</li> <li>• In order to apply the new proposed change, the Author needs to accept it in the normal manner.</li> </ul>
Apply + Accept	Applies the changes into a new merged proposed change, attributed to the Author, and opens the 'Accept' dialog (see below) so the Author can accept the change.  Once the merge has been accepted, all other proposed changes on the paragraph are closed with the comment: "Merged: This change was merged into another one".


The accept dialog resulting from the 'Apply & Accept' button is shown below.

The screenshot shows a 'Merge result' dialog box. At the top, there's a 'Refresh' button. Below it, a text area displays a paragraph with red and green highlights. A blue callout bubble points to this text area with the text: "Optional comment for the merge with default text". Below the text area is a section titled "Enter an optional comment for this merge" with a text input field containing the text "Created by merging other changes together". Below that is a section titled "Enter a reconciliation comment (reason)" with a dropdown menu set to "Accepted" and a text input field. A blue callout bubble points to this input field with the text: "Enter 'Accept' reason if required". At the bottom right, there are "Accept" and "Cancel" buttons.

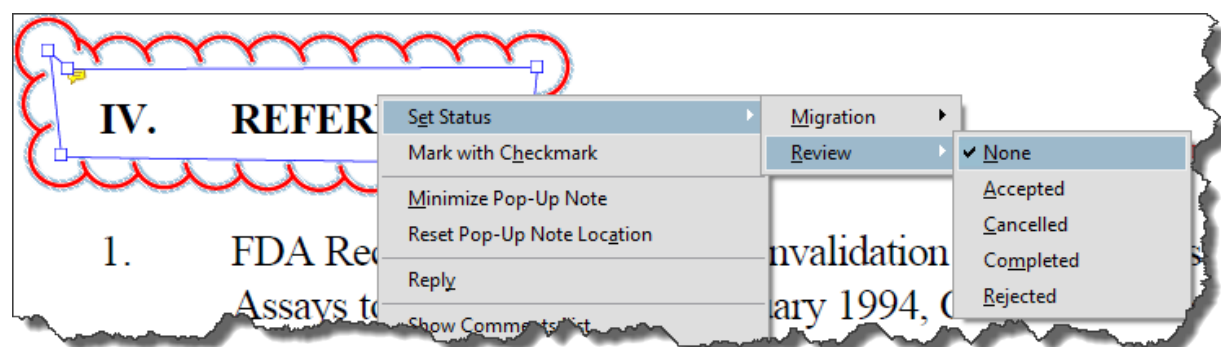
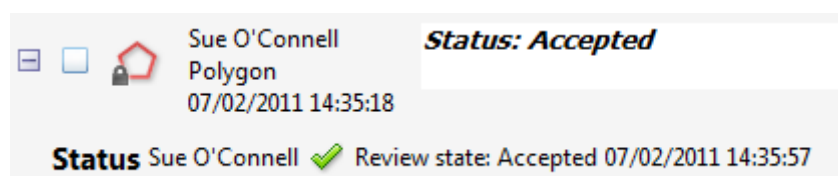
#### 7.4 Accepting and Closing Comments Using the PDF Plug-in v4


Accepting and closing comments using the PDF plug-in v3 works in the same way as for Word documents. However, using v4 of the plug-in the accepting and closing of comments can be done using the Acrobat 'Set Status' menu.



If the status is updated this will not be seen by other participants until the review has been synced with the PleaseReview server. The auto-refresh option (if available) will automatically sync the document to show the latest status. Alternatively, you can manually sync by clicking on the 'PleaseTech Sync' button on the Acrobat toolbar: .

Note: once the sync has completed, even though the status will show correctly in the pop-up relating to the comment or mark-up and also in the Acrobat comment pane, if you go back to the 'Set Status' menu option it is incorrectly shown as 'None':



If you need to re-open a closed or accepted comment you will be able to do this in the PleaseReview comment window. To open the comment window, select the comment or mark-up then click on the 'Open comments window' button on the Acrobat toolbar: .



## 7.5 Creating and Managing Distribution Lists

Review Owners (by default those with Author permissions) have the ability to create and manage personal distribution lists. Shared distribution lists are created and managed by Workgroup Administrators.

Select 'manage lists' under 'distributions lists' from the left hand menu when not in a review.

distribution lists

Editing workgroup demo

personal distribution lists

Title		
my personal list	Edit	Delete

Add New List

Select 'Add New List', then enter the list name (do not call a list 'Everyone' as the system automatically creates a list with this title) and select the participants to be included on the list, and their default list roles. Then click 'Add'. Once you have all the required participants with their appropriate roles shown in the top half of the screen under 'distribution list members', select 'Save List'.

new personal distribution list

distribution list details:

Title:

distribution list members:

Name	Email	Role

Save List Back

workgroup members:

Name	Email	Selected
Demo Author 1	Demo_Author_1@pleasetech.com	<input type="checkbox"/> Reviewer
Demo Author 2	Demo_Author_2@pleasetech.com	<input type="checkbox"/> Reviewer
Demo Contributor 1	Demo_Contributor_1@pleasetech.com	<input type="checkbox"/> Reviewer
Demo Contributor 2	Demo_Contributor_2@pleasetech.com	<input type="checkbox"/> Reviewer
Demo Owner	Demo_Owner@pleasetech.com	<input type="checkbox"/> Reviewer
Demo Reviewer 1	Demo_Reviewer_1@pleasetech.com	<input type="checkbox"/> Reviewer
Demo Reviewer 2	Demo_Reviewer_2@pleasetech.com	<input type="checkbox"/> Reviewer
Demo Reviewer 3	Demo_Reviewer_3@pleasetech.com	<input type="checkbox"/> Reviewer
Demo Reviewer 4	Demo_Reviewer_4@pleasetech.com	<input type="checkbox"/> Reviewer
Steven Heilman	steven.heilman@regeneron.com	<input type="checkbox"/> Reviewer

Select All Deselect All Add

Once the list is saved it will appear under 'personal distribution lists'.

Selecting 'Edit' will permit you to edit the list, and selecting 'Delete' will delete the list.

Note: It is also possible to create and maintain personal distribution lists from a list of review participants created whilst setting up a review. See [Adding Users from Existing Distribution Lists](#).

## 8 Creating a Review

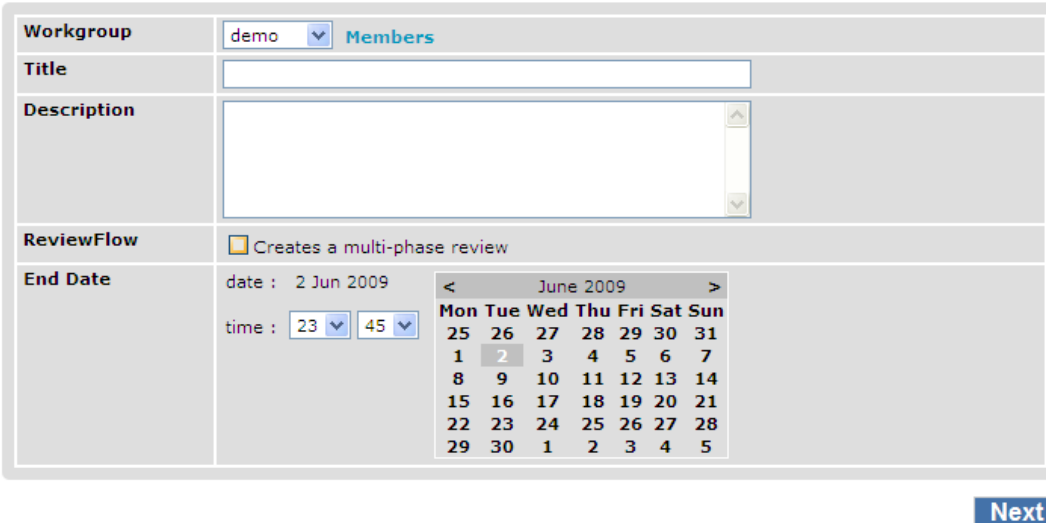
Note: If you are using a PleaseReview System Connector (for integration with a 3<sup>rd</sup> party document management system such as EMC Documentum, Qumas DocCompliance, Open Text Livelink, MasterControl, Microsoft SharePoint, etc.) there is a separate manual covering this.




### 8.1 Review Creation with PleaseReview Web Interface

Please note that review creation is available only to those users with review Author permissions. To create a review, login to PleaseReview, select 'new review' and follow the wizard which is described in the following sections.

#### 8.1.1 Specify Review Details

##### new review step 1: specify review details



Workgroup	demo  <a href="#">Members</a>																																																	
Title	<input type="text"/>																																																	
Description	<input type="text"/>																																																	
ReviewFlow	<input type="checkbox"/> Creates a multi-phase review																																																	
End Date	date : 2 Jun 2009 time :  23  45 <div> <div>&lt; June 2009 &gt;</div> <table border="1"> <thead> <tr> <th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th><th>Sun</th></tr> </thead> <tbody> <tr> <td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> </tbody> </table> </div>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5
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22	23	24	25	26	27	28																																												
29	30	1	2	3	4	5																																												

[Next](#)

Notes:

- The title must be completed and must be unique. The 'End Date' must be in the future;
- The Workgroup selector allows you to select a workgroup other than the one you are in, if appropriate. The 'Members' link displays the members of the selected workgroup in a separate window:

### Members of workgroup demo

Name	Email Address	Role
Demo Author 1	Demo_Author_1@pleasetech.com	Author
Demo Author 2	Demo_Author_2@pleasetech.com	Author
Demo Contributor 1	Demo_Contributor_1@pleasetech.com	Author-Contributor
Demo Contributor 2	Demo_Contributor_2@pleasetech.com	Author-Contributor
Demo Owner	Demo_Owner@pleasetech.com	Admin-Author-Contributor
Demo Reviewer 1	Demo_Reviewer_1@pleasetech.com	Reviewer
Demo Reviewer 2	Demo_Reviewer_2@pleasetech.com	Reviewer
Demo Reviewer 3	Demo_Reviewer_3@pleasetech.com	Reviewer
Demo Reviewer 4	Demo_Reviewer_4@pleasetech.com	Reviewer

Close

- Selecting 'Creates a multi-phase review' creates a ReviewFlow multi-phase review see [ReviewFlow™ Multi-phase Reviews](#) for more information.

### 8.1.2 Upload Documents

#### new review step 2: upload documents

##### documents already attached to this review:

File name	Title	TOC Level	Uploaded	Preparation		
No Documents currently attached						

File	<input type="text"/> <input data-bbox="718 1086 805 1108" type="button" value="Browse..."/>	
Title	<input type="text"/>	
TOC Levels	<input type="radio"/> None <input checked="" type="radio"/> All <input type="radio"/> Limit to: <input type="text" value="1"/>	
Reference document	<input type="checkbox"/>	<input data-bbox="1149 1209 1220 1232" type="button" value="Upload"/>

Previous


Next

Notes:

- Select 'Browse' to locate a document;
- If you do not enter a title, it will default to the filename;
- The 'TOC Levels' enables you to specify the depth of levels of navigation by 'Contents' during the review. PleaseReview uses the Word Heading levels to create navigation by 'Contents';
- Upload the document to get the following:

#### new review step 2: upload documents




##### documents already attached to this review:

File name	Title	TOC Level	Uploaded	Refresh	
 Sample policy document.doc	Sample policy document	All	1 Jun 2009	Processing	<a href="#">Delete</a>

- If the 'Reference document' box is checked, the document is uploaded to the review for reference purposes only and no-one will be able to make comments on it. The 'reference only' status will be indicated on the screen.

You can repeat the browse and upload step to build a document set:

**documents already attached to this review:**

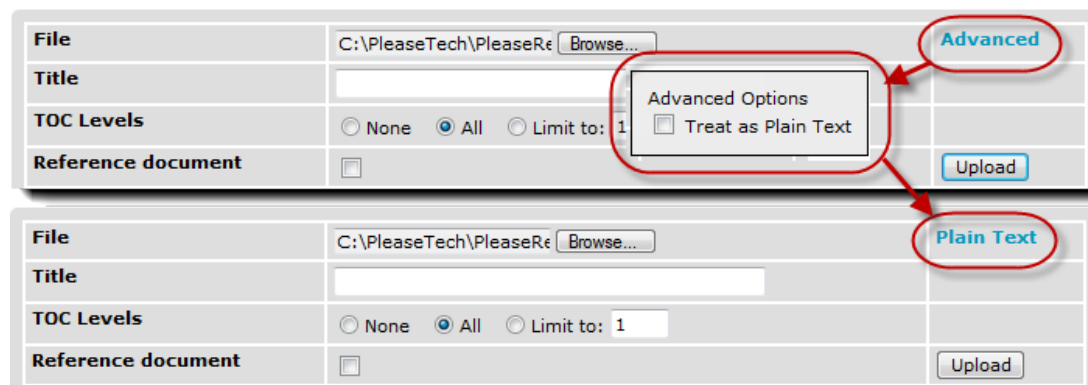
File name	Title	TOC Level	Ref	Uploaded	Preparation		
 Sample policy document.doc	Sample policy document.doc	All		23 Sep 2011	Successful	↓	Delete
 Sample CTR (3_5).doc	Sample CTR (3_5).doc	All		23 Sep 2011	Successful	↑ ↓	Delete
 sample ls.pdf	sample ls.pdf	All	Yes	23 Sep 2011	Successful	↑	Delete

Once uploaded, you can use the up and down arrows to re-order documents in the review.

Note: if you want to create a document comparison between Word documents in the same review (see [Document Comparison and Review linking](#)), the review document and the comparison document must be the only Word documents in the review. The comparison document must be a reference document.

#### 8.1.2.1 Uploading an Unrecognized File Type

If the file extension of the file to be uploaded is not recognized, or there isn't one, an 'Advanced' option appears opposite the browse button in the document upload screen – see below. This allows the selection of 'Treat as Plain Text'. If selected, the document is treated as a plain text document, which is then indicated by the change of the link name to 'Plain Text':



The image shows two screenshots of the document upload interface. The top screenshot shows the 'Advanced' button circled in red, with a red box highlighting the 'Advanced Options' section containing the 'Treat as Plain Text' checkbox. The bottom screenshot shows the 'Plain Text' button circled in red, indicating the state after the checkbox is selected.

For more information on reviewing unrecognized file types see [Reviewing Unrecognized Document Types](#).

#### 8.1.2.2 Uploading a Document with Existing Comments/Track Changes

It is possible to upload a document which already contains Word comments and track changes, however, it is important to note that although they will be visible in the review window they will not be included as PleaseReview comments and proposed changes merely visible as existing document mark-up. So if you click on the paragraph they will not be displayed in the comment window.

Existing Word tracked changes will be lost in the 'round trip' on a paragraph where there are accepted or open proposed changes if the default document download comment settings are used.

If the objective is to retain the existing tracked changes, the Author should specify that proposed changes are applied as Word comments under the 'Select comments' functionality prior to document download. This will have the effect of making all proposed changes Word comments which are attached to the Word paragraph and the existing Word tracked changes will be preserved.

### **8.1.3 Multiple File Uploads**

The use of zip files enables multiple file upload and the creation of image collections. Zip files will be processed as follows:

Each folder containing images will be treated as an 'Image Collection' (see [Image Collections](#)).

Each non-image file will be added to the review as a separate document. The document title will be the same as the filename. Settings on the upload screen like "TOC Level" and "Reference only" apply to all documents in the zip file.

Notes:

- If you have two documents of the same name, or a document with the same name as an image collection, the upload will fail;
- Files are added in zip file order. This will normally be the alphabetic order of the full path (not the filename);
- Zip files are not processed recursively (i.e. if you put a zip file in a zip file, the inner one will be added to the review as if it were a document, not processed as if it were a zip file).

#### **8.1.3.1 Image Collections**

For each folder containing images, the images will be grouped together and added to the review as a single 'Image Collection'. The document title will be the folder name or, if the images are in the top level, the same as the zip file name.

An 'Image Collection' displays the images together for review as if they were a single document within PleaseReview. A table of contents is shown when reviewing an image collection and it lists the names of the files as they were in the original zip file. Layout mode displays an image at a time.

Notes:

- The only way to add an image collection to a review is with the zip file upload;
- If the zip file has two folders of the same name both containing images, these will be merged into a single image list;
- In the review, all images are shown full size.

### 8.1.4 Specify Participants

#### new review step 3: specify participants

participants already included on this review:

Name	Email	Role	Details	Participant
dave	david.cornwell@pleasetech.com	Owner	<a href="#">Edit</a>	<a href="#">Remove</a>

add new participant

Find Users

Name	Email	Selected
<input type="button" value="Select All"/> <input type="button" value="Deselect All"/> <input type="button" value="Add"/>		

[Move to taskgroup](#) [Distribution lists](#) [Add Users](#)

Notes:

- As a review Owner you can set up personal distribution lists. This can either be done prior to starting a review using the option on the left hand menu, 'manage lists', or distribution lists can be created and/or amended from this screen (see [Adding Users from Existing Distribution Lists](#));
- Workgroup Administrators can create shared distribution lists. Note that the system automatically creates a shared distribution list called 'Everyone' which comprises all users in the workgroup;
- Distribution lists include the role assigned to each participant. This can be over-written prior to adding the participants to the review.

#### 8.1.4.1 Adding Users from Search

By entering text in the search box you are able to locate users.

add new participant

Find Users

Users matching search criteria listed

Name	Email	Selected
Jason Webb	jason.webb@pleasetech.com	<input type="checkbox"/> Reviewer

Note: It is not necessary to use wildcards as searching for 'J' (as in the above example) will return all users starting with J. However, if you want to search for users containing certain characters, use \* as a wildcard. For instance, entering "\*smith" will return users ending in smith; entering "\*\*smith\*" will bring back all users containing smith.

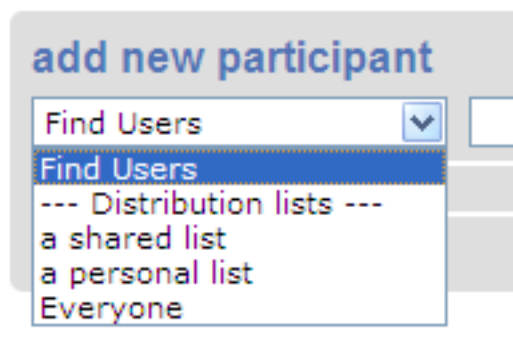
You can then simply add the user by checking the check box, choose their role in the review and select the 'Add' button.

If no users are found matching the criteria this may be because the user is not in the Workgroup. If Taskgroups are enabled you can move the review to a Taskgroup and search again for users. See [Creating/Moving to Taskgroups/Workgroups](#).



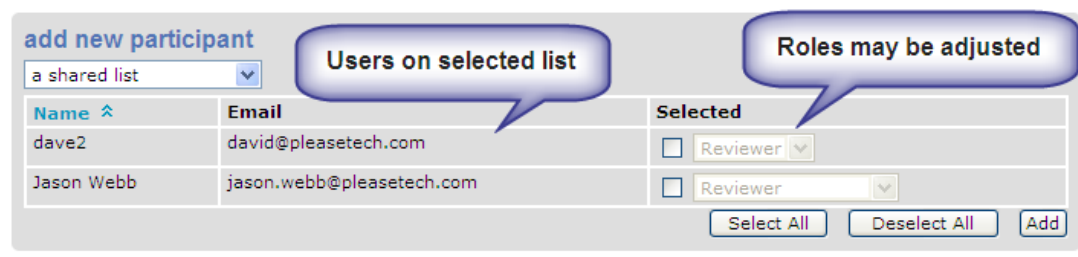
#### 8.1.4.2 Adding Users from Existing Distribution Lists

Select a distribution list from the drop-down.



Note: the system creates a default list called 'Everyone'.

After selecting a list the users on the list will be displayed as shown below. They may then be added to the review.



Note: There is no limit to the numbers of participants in a review and you may add participants from several distribution lists.

#### 8.1.4.3 Special Instructions for Review Participants

Once participants are included in a review the screen will provide the ability to add special instructions using the 'Edit' option, as shown below.

#### new review step 3: specify participants

participants already included on this review:				Add Users
Name	Email	Role	Details	Participant
Demo Author 1	Demo_Author_1@pleasetech.com	Viewer	Edit	Remove
Demo Author 2	Demo_Author_2@pleasetech.com	Reviewer	Edit	Remove
Demo Contributor 1	Demo_Contributor_1@pleasetech.com	Author-Contributor	Edit	Remove
Demo Contributor 2	Demo_Contributor_2@pleasetech.com	Contributor	Edit	Remove
Demo Owner	Demo_Owner@pleasetech.com	Owner	Edit	Remove
Demo Reviewer 1	Demo_Reviewer_1@pleasetech.com	Reviewer	Edit	Remove
Demo Reviewer 2	Demo_Reviewer_2@pleasetech.com	Reviewer	Edit	Remove

Select 'Edit' in the Details column to add 'Special Instructions' for the participant, or to amend the participant's role. Only the participant will see the special instructions.

**edit participant details**

<b>Name</b>	Demo Author 2
<b>Email</b>	Demo_Author_2@pleasetech.com
<b>Role</b>	Reviewer
<b>Special Instructions</b>	This is a note to Demo Author 2. The other participants will not see it

[Update](#) [Cancel](#)

[Previous](#) [Next](#)

An additional column indicates the presence of special instructions for a participant. These instructions are included in the participant's invitation email and also on their review control panel.

**participants already included on this review:** [Add Users](#)

Name	Email	Role	Notes	Details	Participant
Demo Author 1	Demo_Author_1@pleasetech.com	Viewer		<a href="#">Edit</a>	<a href="#">Remove</a>
Demo Author 2	Demo_Author_2@pleasetech.com	Reviewer	Yes	<a href="#">Edit</a>	<a href="#">Remove</a>
Demo Contributor 1	Demo_Contributor_1@pleasetech.com	Author-Contributor		<a href="#">Edit</a>	<a href="#">Remove</a>
Demo Contributor 2	Demo_Contributor_2@pleasetech.com	Author-Contributor		<a href="#">Edit</a>	<a href="#">Remove</a>
Demo Owner	Demo_Owner@pleasetech.com	Owner		<a href="#">Edit</a>	<a href="#">Remove</a>
Demo Reviewer 1	Demo_Reviewer_1@pleasetech.com	Reviewer		<a href="#">Edit</a>	<a href="#">Remove</a>
Demo Reviewer 2	Demo_Reviewer_2@pleasetech.com	Reviewer		<a href="#">Edit</a>	<a href="#">Remove</a>

**Additional column indicates Special Instructions present**

#### 8.1.4.4 Adding New Users to the System

##### new review step 3: specify participants

**participants already included on this review:** [Add Users](#)

Name	Email	Role	Notes	Details	Participant
Demo Author 1	Demo_Author_1@pleasetech.com	Viewer		<a href="#">Edit</a>	<a href="#">Remove</a>
Demo Author 2	Demo_Author_2@pleasetech.com	Reviewer	Yes	<a href="#">Edit</a>	<a href="#">Remove</a>

**Add Users button**

'Add Users' opens a user administration window which would otherwise be accessed from the left hand menu.

#### 8.1.4.5 Creating Distribution Lists from Review Participants

Once participants are in the top half of the pane (i.e. added to the review), it is possible to use this list to create and/or maintain existing distribution lists. Selecting the 'Distribution lists' option will open a new pop-up window:

## distribution lists



### Review details:

<b>Title</b>	a review for lists
<b>Description</b>	
<b>Status</b>	Not Started
<b>End Date</b>	7 May 2010 23:45
<b>Workgroup</b>	Dave's group

### participants already included on this review:

Name	Email	Role
dave	david.cornwell@pleasetechnology.com	Owner
dave2	david@pleasetechnology.com	Reviewer
Jason Webb	jason.webb@pleasetechnology.com	Reviewer


Create or update a distribution list from the current list of review participants


- ☐ Overwrite an existing distribution list a shared list 
- ☐ Create a new personal  distribution list called

**OK** **Cancel**

The options are shown below:

Create or update a distribution list from the current list of review participants

☐ Overwrite an existing distribution list a shared list 

☐ Create a new personal  distribution list called

- You can overwrite an existing distribution list (personal lists only unless you are a Workgroup Administrator). This will replace all the users on the existing list with the current review participants with their associated role, or;
- Create a new distribution list. This will create a new distribution list of the current review participants with their associated role.

### 8.1.4.6 Creating/Moving to Taskgroups/Workgroups

You are only able to add participants to a review if they are in the workgroup in which the review is based.

Taskgroups are designed to allow users from multiple workgroups to participate in the same review. Thus Taskgroups (if available) allow you to include any user on the system in a review, not just those from your workgroup.

## new review step 3: specify participants

participants already included on this review:

Name	Email	Role	Details	Participant
dave	david.cornwell@pleasetech.com	Owner	<a href="#">Edit</a>	<a href="#">Remove</a>

add new participant

Find Users

Name	Email	Selected
<input type="button" value="Select All"/> <input type="button" value="Deselect All"/> <input type="button" value="Add"/>		

[Move to taskgroup](#) [Distribution lists](#) [Add Users](#)

The 'Move to Taskgroup' option opens the dialog shown below:

### Move review to a workgroup or taskgroup

If a review is in a workgroup, you can only add participants on the review if they are already members of that workgroup. If you move the review into a taskgroup, you can add anyone from PleaseReview into the review and they will be automatically added to the taskgroup. The taskgroup will be automatically deleted when it no longer contains any reviews.

☐ A workgroup or taskgroup I'm already a member of

☐ Create a new taskgroup called

☐ An existing taskgroup I'm not yet a member of (you will be added to the taskgroup)

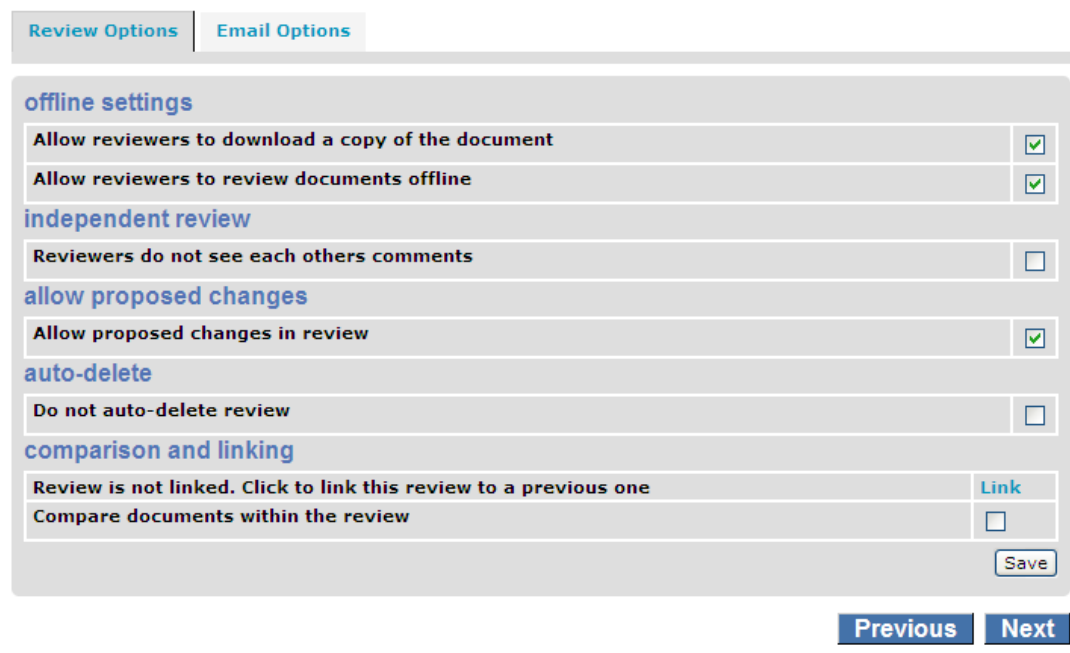
This allows the review to:

- Be moved to a different Workgroup or Taskgroup of which you are already a member;
- Be moved to a new Taskgroup which you create instantly;
- Be moved to an existing Taskgroup of which you are not a member (but the system will automatically add you).

Note: Taskgroups are designed to be a self-maintaining temporary environment for cross workgroup collaboration. They are automatically deleted if there are no reviews in them and you will be automatically removed from their membership if you are not in a review in that Taskgroup.

### 8.1.5 Other Review Options

#### new review step 4 : review options



**Review Options** | **Email Options**

**offline settings**

Allow reviewers to download a copy of the document ☒

Allow reviewers to review documents offline ☒

**independent review**

Reviewers do not see each others comments ☐

**allow proposed changes**

Allow proposed changes in review ☒

**auto-delete**

Do not auto-delete review ☐

**comparison and linking**

Review is not linked. Click to link this review to a previous one [Link](#)

Compare documents within the review ☐

[Save](#)

[Previous](#) [Next](#)

The operation of the buttons displayed above is as follows:

- 'Previous' and 'Next' step through the new review wizard. They do NOT affect tab selection;
- 'Save' will save any selections made in the tab;
- Changing tabs after making an amendment in a tab, and without saving it, will generate a prompt asking the Owner to save or discard the changes.

Note: If your system has an extra tab (not displayed here) then that is a 'Metrics' tab which is a system-configurable setting. The name of the tab is configurable. If not enabled, it will not appear. For more information see [Metrics Tab](#).

#### 8.1.5.1 Review options

The 'Review Options' tab allows the Owner to configure download, offline and independent review settings (displayed in the screen shot above):

Option	Description
Download copy of document	This option provides Reviewers with the option to download a copy of the original document. This copy of the document is not designed for offline review, but is simply a means of providing a 'clean' copy of the document from the system.
Offline review	This option defines whether Reviewers are able to review offline. If selected, the offline review options are enabled, and the documents are available to the offline review client (OLC) application.
Independent review	This option creates an independent review. Reviewers cannot see each other's comments

	(and are not even aware that other Reviewers exist) whilst the Owner's experience is unchanged; they see all comments, etc.
Allow Proposed Changes	If de-selected, this option disables the proposed change functionality within the review and thus the review participants can only make comments and they will not be able to mark-up the document.
Do not auto-delete	This option prevents the review being automatically deleted or moved to the recycle bin (if available) after a system defined interval following the last activity. The review must be completed to be auto-deleted.
Comparison and linking	See <a href="#">Document Comparison and Review linking</a> .

### 8.1.5.2 Email Options

The 'Email Options' tab allows the Owner to configure various email options as shown see below. Note: some options may not be available as they may be disabled by system policy settings.

#### review options - EditZones 2

Option	Description
Send invitation emails to participants	Unchecking 'Send invitation emails to participants' stops automatic system-generated review invitation emails from being sent to review participants. The Owner can send personal emails with review URLs or communicate this information to participants in another manner. Review URLs are available from the Owner's review control panel (see <a href="#">Review Control Panel</a> ).
Send me an email when all participants indicate they	Unchecking 'Send me an email when all participants indicate they have completed the review' prevents the Owner receiving an

have completed the review


This document is currently a template. Inform reviewers that there may initially be no content to review but that they will be notified when content becomes available

Notify contributors if new EditZones are allocated while the review is in progress

When an EditZone is published for review, all reviewers are notified of this

Notify me whenever an EditZone is revised

Email reminders



automatic system email when all Reviewers have set their status to 'Completed'.

This option includes text in the invitation email to the effect that the document is a template and that there may be no content to review until they receive a further email.

Contributors will be notified by email if new EditZones are allocated while the review is in progress.

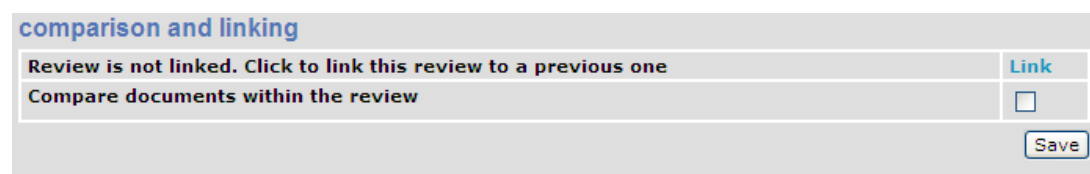
Generates a new email to all Reviewers whenever an EditZone is published for review by a Contributor.

Notifies the review Owner whenever an EditZone is revised or published for review.

Up to three reminder emails can be sent. Set the days upon which you want reminders sent. Only participants who have not completed their review will receive reminders. For example: 3,2,1 (as shown opposite) will send Reviewers who have not completed the review (i.e. set their status to 'Completed') an automatic system generated email three days, two days and one day prior to the review due date.

### 8.1.5.3 Document Comparison and Review linking

Document comparison is available for Word documents only. For document comparison to be available to the Reviewers, the review Owner must enable the option when the review is set up.



There are two ways to provide document comparison; either (i) comparing documents in the same review, or (ii) comparing documents between reviews.

Note: this is an either/or option. It is not possible to compare documents within one review whilst linking to another review.

Note: All comparison and linking is removed and must be remade if a document is added to the review after the review has been started. In this event, you will need to use the 'edit details' functionality to re-link the reviews or compare the documents within the review (assuming it is still compliant – see below).



## Compare Documents Within the Review

The objective of this functionality is to allow review Owners to upload both the document under review and a previous iteration of the document for reference purposes. Thus Reviewers will be able to observe the changes between the document under review and the previous iteration.

- In this event there can only be two Word documents in the review and one must be a 'Reference only' document. It is possible to have other (non-Word) documents in the review;
- PleaseReview will generate the comparison between the Word document for review and the reference only Word Document (typically a previous version of the document).

This document comparison is initiated by selecting the check box 'Compare documents within the review'.

Compare documents within the review	<input type="checkbox"/>
-------------------------------------	--------------------------

## Compare Documents Between Reviews

The objective of this functionality is to allow review Owners to make available a comparison between documents in different reviews.

For example, if the review is part of a series of reviews of the same document set then Reviewers can observe the changes between the current document(s) under review and the previous iteration of the document(s). Ultimately, if there are several iterations of the document set, it is possible to build up a complete picture of the changes from the first iteration to the final iteration by following the linked comparison backwards through the document set.

The review Owner links the review to a previous review by selecting the 'Link' option. A list of the other reviews owned by the review Owner is then displayed (see below). The review Owner can then select the review to which the current review should be linked.

Documents within the review will be compared as follows:

Current Review		Linked Review	
1st Word document	→	1st Word document	
2nd Word document	→	2nd Word document	
3rd Word document	→	3rd Word document	

Any non-Word documents will simply be ignored so it is possible to have a review with multiple document types and several Word documents being compared.

This document comparison and review linking is initiated by selecting the 'Link' option.

Review is not linked. Click to link this review to a previous one	<a href="#">Link</a>
---	----------------------

This will open a view showing all reviews owned by the review Owner as shown below.

### comparison and linking

Select the previous review to link to this one

Select by review status ☐ In progress ☐ Closed ☒ Completed

Review Title	
demo	<a href="#">select</a>
policy doc amended	<a href="#">select</a>

[Cancel](#)

[Save](#)

Once selected, the main screen will update to show the selection with the 'Compare documents within the review' option Grayed out, as shown below:

comparison and linking

This review is linked to review "policy doc amended" [Unlink](#)

Compare documents within the review ☐

[Save](#)

The 'Unlink' option cancels the link.

### 8.1.6 Verify Details and Start Review

The final step is to review the details and confirm them.

### new review step 5: verify details and start review or put it on hold

**review details** [Edit](#)

<b>Title</b>	For user manual
<b>Description</b>	
<b>Status</b>	Not Started
<b>End Date</b>	2 Jun 2009 23:45

**participants** [Edit](#)

Name	Email	Role
Demo Author 1	Demo_Author_1@pleasetechnology.com	Viewer
Demo Author 2	Demo_Author_2@pleasetechnology.com	Reviewer
Demo Contributor 1	Demo_Contributor_1@pleasetechnology.com	Author-Contributor
Demo Contributor 2	Demo_Contributor_2@pleasetechnology.com	Contributor
Demo Owner	Demo_Owner@pleasetechnology.com	Owner
Demo Reviewer 1	Demo_Reviewer_1@pleasetechnology.com	Reviewer
Demo Reviewer 2	Demo_Reviewer_2@pleasetechnology.com	Reviewer

**documents** [Edit](#)

File name	Title	Ref	Preparation		
Sample policy document.doc	Sample policy document		Successful	<a href="#">Preview/EditZones</a>	<a href="#">Delete</a>
sample ls.pdf	sample ls	Yes	Successful	<a href="#">Preview</a>	<a href="#">Delete</a>

[Delete Review](#) [Review Options](#)

[Put Review on Hold](#) [Start Review](#)

Notes:

- To edit the details, select the 'Edit' button against the appropriate area. To amend review or email options, select the 'Review Options' link;

- Documents can be previewed by selecting the 'Preview' link. This shows the document as Reviewers will see it;
- EditZones may be created by selecting the 'Preview/EditZones' link. See [Creating EditZones](#) below;
- Review can be 'Started' or placed 'On Hold';

Starting the review will send invitation emails to all participants and initiate the review;

If placed 'On Hold', the review will not commence;

Note: To start a review placed 'On Hold', see [Review Control Panel](#).

#### **8.1.7 Some Notes on PleaseReview's Document Preparation Process**

- Each Word, Excel, PDF and PowerPoint document must be prepared for display by PleaseReview. Preparation is automatic and initiated once the document has been uploaded;
- Occasionally a document will not have completed preparation when starting a review. This depends on the size of the document and the status of the preparation queue;
- If the document status is still 'Under Preparation', you will not be able to preview the document. You will still be able to set the review to 'Start' and the review will start as soon as preparation is complete;
- If preparation is not complete and you wish to preview the document, place the review 'On Hold' and then come back to preview the document after an appropriate interval.
- 
- Note: by default, if a document fails preparation the review is not started. However, there is a system policy setting which, if enabled, allows reviews with documents which failed preparation to be started. The failed document(s) will be treated as unsupported document types. See [Advanced – File Type Not Recognized](#) for more information.

#### **8.1.8 Metrics Tab**

The 'Metrics' tab is a system-configurable setting. If not enabled, it will not appear. The name of the tab is configurable (see above).

The 'Metrics' tab allows the Owner to enter values against fields which enable the review to be categorized for reporting purposes.

**new review step 4 : review options**

Review Options | Email Options | Metrics

Node Id	<input type="text"/>
Size	<input type="text"/>
Units	Pages ▾
Stage Detected	Baseline ▾

Save

Previous Next

Note: the 'Metrics' tab is a system-configurable setting. If not enabled, it will not be available. All fields, field types, etc., even the name of the tab, is configurable at system level. Therefore, the number and type of fields will be different from installation to installation. Fields may be validated at entry time.

## 8.2 ReviewFlow™ Multi-phase Reviews

ReviewFlow provides additional flexible review workflows with options for sequential, multi-phase reviews in which each phase may be collaborative or independent.

Options allow automatic or manual transition from one phase to another. The Owner receives a consolidated view of comments and may select which comments transition between phases while retaining complete records of separate individual phases.

### 8.2.1 ReviewFlow Approach

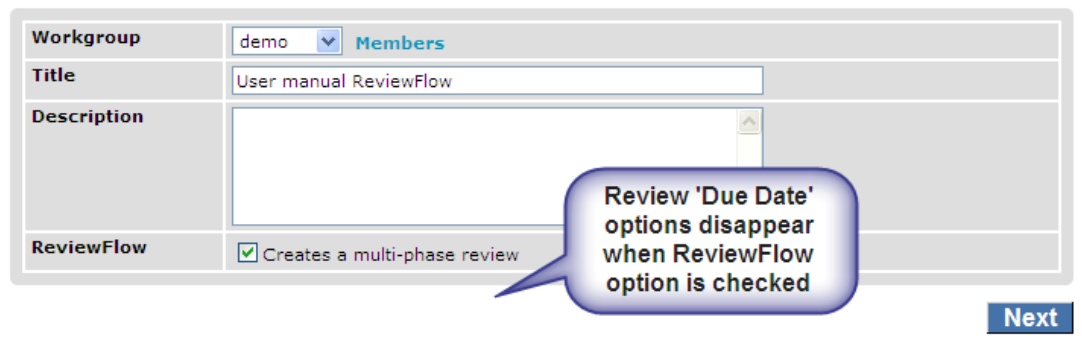
Each phase in a multi-phase review is an individual review in its own right. Thus a multi-phase review is essentially a collection of individual reviews which are managed centrally by the Owner, and on which the Owner has a consolidated view. This has several advantages and consequences:

- Each phase is a separate review and can have separate Reviewers. If a Reviewer is in multiple phases, the phases will appear as separate reviews in the Reviewer's inbox. However, Phase 2 (for example) will not appear until Phase 1 is complete and is listed under 'Completed reviews';
- All review options are available and apply individually to each phase. Thus a review could, for example, be collaborative for one phase and independent for another phase. Offline review could be enabled for one phase and not for another, and so on.

### 8.2.2 Multi-phase Review Set-up

Setting up a multi-phase review is enabled by selecting the multi-phase option on the first screen of the new review wizard, as shown below.

## new review step 1: specify review details



Workgroup: demo Members

Title: User manual ReviewFlow

Description:

ReviewFlow: ☒ Creates a multi-phase review

Review 'Due Date' options disappear when ReviewFlow option is checked

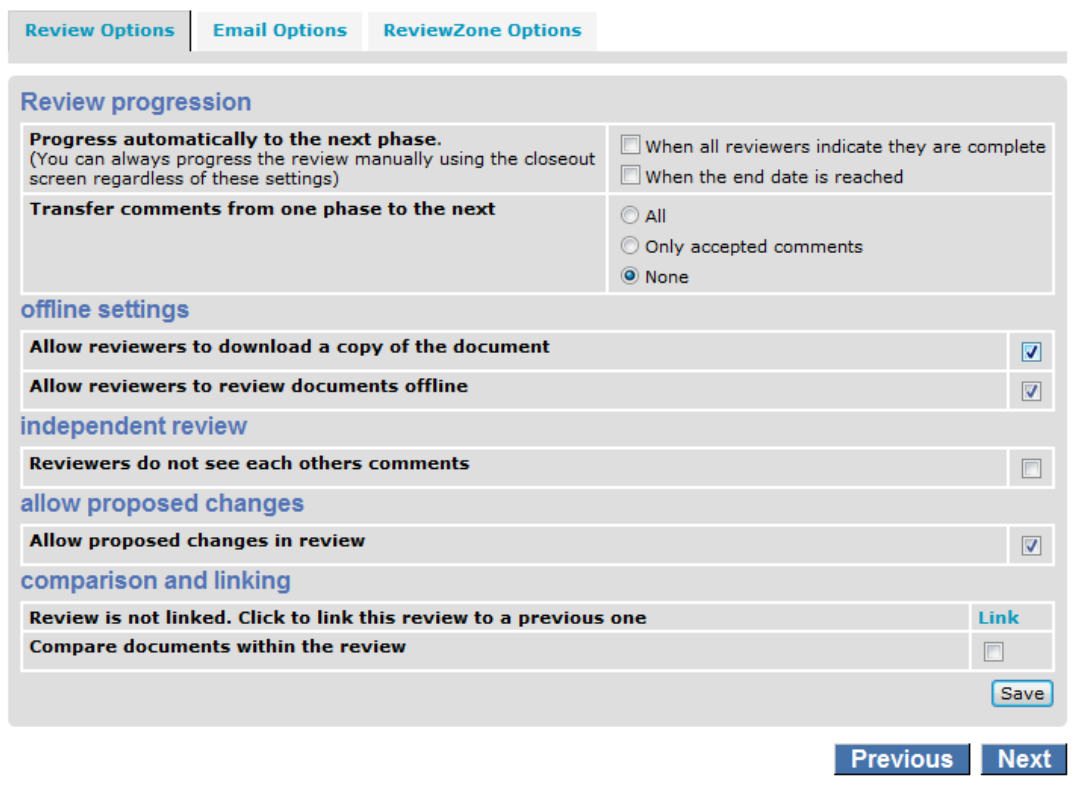
Next

Selecting this option converts the review set-up wizard to a multi-phase review set-up.

Step 2, 'upload documents', is the same as for a standard review.

Step 3 in the ReviewFlow set-up is the specification of review options. This includes the defaults for review progression between the stages. These defaults may be over-riden for each individual phase.

## new review step 3 : review options



Review Options | Email Options | ReviewZone Options

**Review progression**

**Progress automatically to the next phase.**  
(You can always progress the review manually using the closeout screen regardless of these settings)

☐ When all reviewers indicate they are complete

☐ When the end date is reached

**Transfer comments from one phase to the next**

☐ All

☐ Only accepted comments

☒ None

**offline settings**

**Allow reviewers to download a copy of the document** ☒

**Allow reviewers to review documents offline** ☒

**independent review**

**Reviewers do not see each others comments** ☐

**allow proposed changes**

**Allow proposed changes in review** ☒

**comparison and linking**

**Review is not linked. Click to link this review to a previous one** [Link](#)

**Compare documents within the review** ☐

Save

Previous Next

The review progression options include automatic progression from phase to phase, and which comments should be included in the next phase.

The review Owner is able to progress the review to the next phase manually by using the review control panel. But they can also elect to have the review progress automatically to the next phase when either all Reviewers have indicated that they have completed their review (i.e. all Reviewers have set their

status to 'Completed'), and/or the review end date is reached. If both options are selected, the review will progress on the first event.

The review Owner can select which comments are included in the new phase, using the following options given below:

Comment selection	Description
All	All comments included in the phase are included in the subsequent phase, even if they are made by a Reviewer who is not included in the subsequent phase.
Only accepted comments	Only accepted comments and changes are included in the subsequent phase.
None	No comments or changes are included in the subsequent phase.

Email options are the same as for a standard review.

The final step of the multi-phase review set-up wizard is the creation of the phases.

#### new review step 4: set up phases

**phases**

Title	Details	Participants	Review Options	Phases
No phases currently defined				

**Add**

**Previous** **Next**

Selecting 'Add' will add a phase.

#### new review step 4: set up phases

**phases**

Title	Details	Participants	Review Options	Phases
No phases currently defined				

**Add**

**Overtyping default title**

**details for phase 1**

<b>Title</b>	User manual ReviewFlow phase 1
<b>Description</b>	Enter duration
<b>Duration</b>	2 days

**Save** **Cancel**

It is recommended that you add all phases prior to editing them to set details (see below).

#### new review step 4: set up phases

**phases**

Title	Details	Participants	Review Options	Phases
User manual ReviewFlow phase 1	<a href="#">edit</a>	<a href="#">edit</a>	<a href="#">edit</a>	<a href="#">remove</a>
User manual ReviewFlow phase 2	<a href="#">edit</a>	<a href="#">edit</a>	<a href="#">edit</a>	<a href="#">remove</a>
User manual ReviewFlow phase 3	<a href="#">edit</a>	<a href="#">edit</a>	<a href="#">edit</a>	<a href="#">remove</a>
User manual ReviewFlow phase 4	<a href="#">edit</a>	<a href="#">edit</a>	<a href="#">edit</a>	<a href="#">remove</a>

[Add](#)

[Previous](#) [Next](#)

The Owner is then able to edit each phase to specify the participants in each phase and to overwrite (if required) the review options for each phase. Specifying participants is the same process as in a standard review set-up.

The review options include whether (and how) the review progresses automatically from one phase to another (the Owner can always progress it manually), and which comments are transferred between the phases.

The final stage is very similar to the standard review except that the review phases are shown instead of the participants – see below.

#### new review step 5: verify details and start review or put it on hold


**review details** [Edit](#)

<b>Title</b>	User manual ReviewFlow
<b>Description</b>	
<b>Status</b>	Not Started
<b>End Date</b>	

**review phases** [Edit](#)

Title	Days
User manual ReviewFlow phase 1	2
User manual ReviewFlow phase 2	2
User manual ReviewFlow phase 3	2
User manual ReviewFlow phase 4	2

**documents** [Edit](#)

File name	Title	Preparation	
 Sample policy document.doc	Sample policy document	Successful	<a href="#">Preview</a>

[Delete Review](#) [Review Options](#)

[Put Review on Hold](#) [Start Review](#)

It is only possible to specify a phase in terms of duration, for example, '2 days'.

### 8.3 Review Creation with PleaseTech Client

Please see separate user manual for 'The PleaseTech Client'.

Notes: The notes on document preparation above still apply.



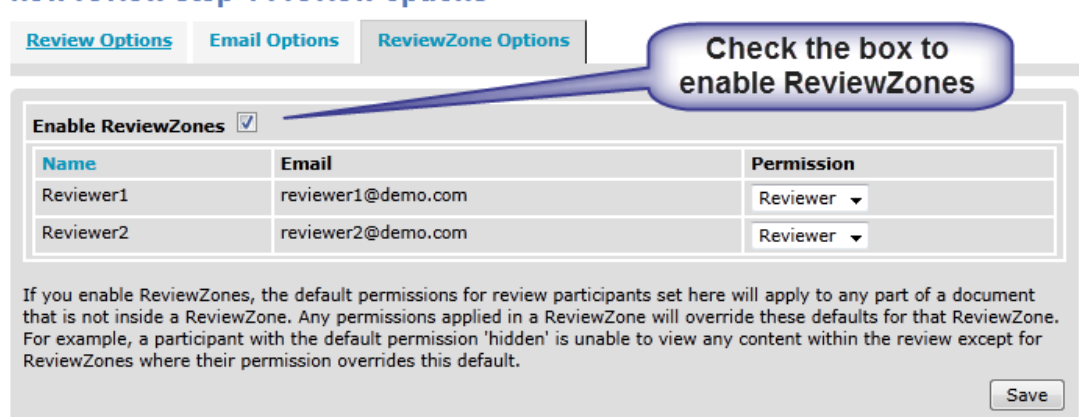
## 8.4 ReviewZones

ReviewZones are areas of a Word document which the review Owner can setup to prevent individual participants from reviewing (i.e. commenting upon and marking-up) or even viewing.

### 8.4.1 Enabling/Creating ReviewZones

ReviewZones can be enabled at Step 4 of the new review wizard by clicking on the 'ReviewZone Options' tab:

#### new review step 4 : review options



**Enable ReviewZones** ☒

Name	Email	Permission
Reviewer1	reviewer1@demo.com	Reviewer ▼
Reviewer2	reviewer2@demo.com	Reviewer ▼

If you enable ReviewZones, the default permissions for review participants set here will apply to any part of a document that is not inside a ReviewZone. Any permissions applied in a ReviewZone will override these defaults for that ReviewZone. For example, a participant with the default permission 'hidden' is unable to view any content within the review except for ReviewZones where their permission overrides this default.

Save

By default all participants will be given Reviewer permission (unless they are only Viewers on the review in which case that would be their default permission). Participant permissions for the entire review can be changed at this point by clicking on the drop down list alternatively permissions can be selected as the ReviewZones are setup.

ReviewZones may be created before the review has started by selecting the 'Preview/ReviewZones' option at Step 5 of the new review wizard. Note that this option will only be available if ReviewZones have been enabled via the Review Options screen (see above).

ReviewZones can be created once the review has already started, however, to avoid user confusion we recommend that they are setup before starting the review.

In preview mode clicking on a paragraph will automatically open the comment window with the Zones tab selected. If the review includes participants with the role of Contributor you need to ensure you have the correct Zone Type selected from the drop down list.

You may select as little as a single paragraph or as much as the whole document to be a ReviewZone. PleaseReview has a number of automatic selection rules and a few selection limitations which are discussed under EditZones see [Automatic Selection Rules for EditZones \(and ReviewZones\)](#).

The ReviewZones creation window is shown below:

**zones on Sample policy document.doc** Paragraph Id 19 [refresh](#)

**Bookmarks** **Zones**

**Type** ReviewZones ▼

**paragraph range: 19 to: 59** [mark end]  
click "mark end" to set the end paragraph.

**Title**  
2.2 Analysis

**Optional description**

Name	Email	Permission
Reviewer1	reviewer1@demo.com	Reviewer ▼
Reviewer2	reviewer2@demo.com	Reviewer ▼

**Apply**

Navigate by: << reviewzones >>

The drop down list of permissions available for each participant will be dependent on their role in the review.

Permission	Effect
Hidden	Participant will not be able to see or comment on this ReviewZone.
Viewer	Participant will be able to view this ReviewZone but they will not be able to comment or propose changes to it.
Reviewer	Participant will be able to review this ReviewZone as normal.
Author	Participant will be able to 'Accept' and 'Close' comments on this ReviewZone.

If you select a paragraph which is covered by the automatic selection rules, PleaseReview will have populated the end paragraph as shown above. If you select a paragraph which is not covered by the automatic selection rules (as shown below), you need to mark the end of the selection.

zones on Sample policy document Paragraph Id 100 [refresh](#)

[Bookmarks](#) [Zones](#)

**Type** ReviewZones

**paragraph range:** 100 to: [\[mark end\]](#)  
click "mark end" to set the end paragraph.

**Title**  
Procedures are detailed documents, they are tied to

**Optional description**

Name	Email	Permission
Reviewer1	reviewer1@demo.com	Reviewer
Reviewer2	reviewer2@demo.com	Reviewer

[OK](#) [Close](#) [Apply](#)

Navigate by: << reviewzones >>

You mark the end of the selection area by clicking on the '[mark end]' link and then clicking on the end paragraph in the document itself. This will insert the end paragraph number and provide the ability to cancel the mark.

**Step 1:** Click on the initial paragraph to open the comment window with start paragraph range populated

**Step 2:** Click on [\[mark end\]](#) to select the end paragraph

**Step 3:** Click on the end paragraph in the document

**Step 4:** The end paragraph range will be inserted automatically

The screenshot shows the 'Zones' tab with the 'paragraph range' set to '100 to: [mark end]'. The document content on the right shows a paragraph about 'Procedures are detailed documents...'. The bottom of the screenshot shows a status bar with various time zones.

**Type** ReviewZones

**paragraph range:** 100 to: 102 [\[cancel mark\]](#)  
select the end paragraph in the document or click "cancel mark".

To reset the start paragraph simply cancel the entire ReviewZone and start again, clicking on the new start paragraph.

Notes:

- The ReviewZone title is pre-populated from the document's contents. It may be over-typed;
- The description is optional;
- The drop-down box includes a list of all permissions available for that participant;
- ReviewZones are not identified in the document by shading or any other visual indicator;
- ReviewZones may not overlap and must be on discrete parts of the document;
- ReviewZones and EditZones can co-exist in the same document but may not overlap. However, a single zone may be both a ReviewZone and an EditZone.

Once created, the ReviewZones will be visible in the left hand navigation pane when navigating by ReviewZones.

### **8.5 Basic templating**

The purpose of the basic templating functionality is to pre-populate some or all review attributes with the template selection. This means that the review Owner does not have to set-up standard reviews manually.

The templates are defined in XML files and are therefore controlled by the system administrator. They are not user definable. Templates can define some or all the parameters of a review. Templates use pre-defined distribution lists to allocate users to a review. These pre-defined lists specify the users in the review/review phase and their roles and all users in the reference list are automatically included in the review. Thus the template does not need to be altered to adjust the participants, only the Shared Distribution list need be adjusted.

Templates therefore greatly simplify the review set up for a review Owner as all they have to do to set-up a review is select from a set of pre-defined templates. It should be noted that the templates pre-populate the attributes but do not prevent the review Owner overriding them during the review set-up using the standard PleaseReview screens.

## new review step 1: specify review details

The screenshot shows the 'new review step 1: specify review details' form. The form has several sections: 'Workgroup' (Demo1), 'Title', 'Description', 'ReviewFlow', 'Review Template', and 'End Date'. Two red boxes highlight the 'Creates a multi-phase review' checkbox and the 'Marketing' dropdown menu. A red arrow points from the 'Marketing' dropdown in the 'Review Template' section to the 'Marketing' dropdown in the 'ReviewFlow' section. A calendar for September 2011 is visible at the bottom right.

Some notes:

- Templates are Workgroup and type (i.e. single phase or multi-phase review) specific;
- The 'Review Template' section (as shown above) will only be shown if templates are defined and available. If no templates are available for the specified type/Workgroup then the section will not be shown;
- Each template has a template name (as used in the item 2 selector) and template group (used in the item 1 selector). Template group is optional. This means that, depending on requirements, it is possible to have two selectors (the contents on the item 2 selector being dependent on the selection in item 1) or a single selector;
- The top (default) entry in each listbox is <none> which allows the user to create a review with no template even when templates are available;
- There is a 'master/slave' relationship between template groups and templates: i.e. when you select a template group in the first selector, the second selector will show all templates of that group. Until you have selected a template group, the second selector will remain empty;
- If all templates of the selected type are in the same group or all have no group, then the template group selector will be omitted and all templates will be listed in the item 2 selector which will be the only selector displayed;
- Switching the multi-phase checkbox on the new review screen will change the list of templates based on the template type. If there are no templates for single-phase review and there are some for multi-phase review then the whole template section on the screen will only appear when the box is checked.

## **9 Document Owner - Creating and Working with EditZones**

EditZones are areas of the Word document which are assigned to Contributors or Super-Contributors. Contributors and Super-Contributors may download their EditZone(s), edit them using Word, and subsequently upload a revised version.

Thus the 'master' Word document (i.e. the one loaded into PleaseReview) can be broken down into a series of smaller Word documents which can be edited by Contributors. PleaseReview manages the master Word document and includes the edited sections when uploaded.

A Super-Contributor has all of the permissions of an Author and Contributor combined within a review. The review Owner is automatically a Super-Contributor if they have an Author-Contributor role in the review. Super-Contributors are also able to assign EditZones to themselves anywhere in the document and open any paragraph directly in Word for editing if they are using the paragraph toolbar.

### **9.1 Creating EditZones**

EditZone functionality is only enabled once the review Owner has added a participant to the review with a role of Contributor or Super-Contributor. EditZones may be created before the review has started by selecting the 'Preview/EditZones' option at Step 5 of the new review wizard, or they can be created after the review has been started.

If in preview mode (i.e. you are creating EditZones prior to starting the review), clicking on a paragraph will automatically open the comment window with the EditZones tab selected. If creating an EditZone once the review has started, the comment window will open with the 'EditZones' tab selected only if you are navigating by EditZones.

You may select as little as a single paragraph or as much as the whole document to be an EditZone. PleaseReview has a number of automatic selection rules and a few selection limitations which are discussed in the appropriate selection below.

The EditZones creation window is shown below:

zones on Sample policy do Paragraph Id 1  
refresh

**Bookmarks** **Zones**

**Type** EditZones Zone type selected

**paragraph range: 1 to: 11** [mark end] EditZone range selected  
click "mark end" to set the end paragraph.

**Title**  
1 Policies, Procedures, Standards, Baselines Default title pre-populated from document contents

**Optional description**

**Contributor** Assign to one or more contributors

Name	Email	Selected
Bob Auth-Contrib	reviewer4@demo.com	<input type="checkbox"/>
Jason Contributor	reviewer3@demo.com	<input type="checkbox"/>

**OK** **Close** **Apply**

Navigate by: << editzones >>

If you select a paragraph which is covered by the automatic selection rules, PleaseReview will have populated the end paragraph as shown above. If you select a paragraph which is not covered by the automatic selection rules (as shown below), you need to mark the end of the selection.

zones on Sample policy document Paragraph Id 16 refresh

Bookmarks Zones

Type EditZones

paragraph range: 16 to: [mark end]  
click "mark end" to set the end paragraph.

Title  
Online meeting technology differs from PleaseReview

Optional description

Contributor

Name	Email	Selected
Bob Auth-Contrib	reviewer4@demo.com	<input type="checkbox"/>
Jason Contributor	reviewer3@demo.com	<input type="checkbox"/>

OK Close Apply

**EditZone end paragraph not selected**

You mark the end of the selection area by clicking the '[mark end]' link and then clicking the end paragraph on the document itself. This will insert the end paragraph number and provide the ability to cancel the mark.

Sample policy document.doc - Windows Internet Explorer

http://klddev.pleasetechnet.net/PleaseReview/3.2.2/Paragraph

zones on Sample policy document Paragraph Id 16 refresh

Bookmarks Zones

Type EditZones

paragraph range: 87 to: [mark end]  
click "mark end" to set the end paragraph.

Title  
Standards are much more specific than policies. St

Optional description

Contributor

Name	Email	Selected
Bob Auth-Contrib	reviewer4@demo.com	<input type="checkbox"/>
Jason Contributor	reviewer3@demo.com	<input type="checkbox"/>

OK Close Apply

Navigate by: << editzones >>

**Step 2: Click on [mark end] to select**

**Step 1: Click on the initial paragraph to open the comment window with start paragraph range populated**

**Step 4: The end paragraph range will be inserted automatically**

**Step 3: Click on the end paragraph in the document**

any will now retain records of employee inventions and patents for associated with the... 3.2.2 Procedures

work, or device must adhere to. Baselines are usually mapped to specify that all computer systems comply with a minimum Trusted rd. TCSEC standards are discussed in detail in Chapter 5, "System

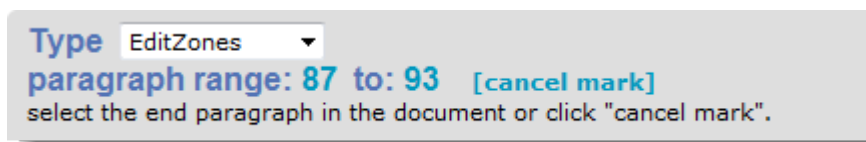
by which to determine a course of action. It's a recommendation or flexible so it can be customized for individual situations.

Whereas guidelines are used to determine a recommended course of action, policies state what other competent security professionals would

A procedure is the most specific of security documents. A procedure is a detailed, in-depth, step-by-step document that detail exactly what to be done... an analogy, when you turn on the power, you have the power on for the power to be on.

Version 4.2.0 (dev 29 Sep 2011)  
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To reset the start paragraph simply cancel the entire EditZone and start again, clicking on the new start paragraph.

Notes:

- The EditZone title is pre-populated from the document's contents. It may be over-typed;
- The description is optional;
- The drop-down box includes all review participants with a role of Contributor. Only one Contributor may be assigned per EditZone;
- EditZones may not overlap and must be on discrete parts of the document.

Once created, the EditZones will be visible in the left hand navigation pane when navigating by EditZones.

### **9.1.1 Automatic Selection Rules for EditZones (and ReviewZones)**

PleaseReview's EditZone automatic selection rules distinguish between 'validation rules' and 'smart select', which tries to guess what you want to select, and automatically marks the end when you mark the start.

The validation rules which you cannot override are:

1. You cannot include a paragraph without selecting its footnotes and textboxes;
2. You cannot select part of a table;
3. You cannot have the start or end inside a header or footer, unless they are both inside the same header/footer, i.e. headers and footers are treated as separate areas of the document.

'Smart select', which can be overridden includes:

1. If the start paragraph is a Word heading level, all paragraphs to the next same level heading will be automatically selected. So, for example, if you select a level 1 heading, the selection will automatically include everything to the next level 1 heading;

To override the automatic selection, click on '[mark end]' and select another paragraph;

2. If the start paragraph includes any part of a table, the entire table will be automatically selected.

You cannot override the validation rules but you can override the 'smart select'. 'Smart select' only applies when marking the start and you can override it by marking the end manually (although the end will still be subject to the validation rules).

So, for example, if you click inside a table when marking the start, this will set the start position to the beginning of the table (validation rule). It will also mark the end of the selection as the end of a table ('smart select'). You can then change the end (overriding the 'smart select') and it will not change the start, although if your new end position is in a table (it may be a different table) it will adjust it to be the end of the table.

## 9.2 Controlling an EditZone

The Review Owner has control over the EditZone and can Reset and Complete EditZones. The options available depend on the Contributor's status in respect of the EditZone.

### 9.2.1 Contributor has Published an EditZone for Review

Once a Contributor has published an EditZone for review the review Owner has the option to 'Complete' the EditZone or 'Undo-Publish'.

**zones on Sample policy document.doc** Paragraph Id 1  
refresh

Comments | Bookmarks | **Zones** | Notify

Type EditZones

<b>Title</b>	1 Policies, Procedures, Standards, Baselines, and
<b>Paragraph range</b>	1 to: 11
<b>Description</b>	
<b>Assigned to</b>	Jason Contributor
<b>Status</b>	Available for review

[Close](#)

Navigate by: << editzones >>

**editzone history**

Ver 2	Publish	30 Sep 2011 10:08	<a href="#" style="color: #0056b3; text-decoration: none;">Complete</a> <a href="#" style="color: #0056b3; text-decoration: none;">Undo-Publish</a>
Ver 1	Publish	30 Sep 2011 10:07	

If the review Owner 'Completes' the EditZone, this removes the EditZone from the document and there is no longer any indication that an EditZone existed in the document. The EditZone history section will no longer be available in the Zones tab but information will be stored in the EditZone History available via the review control panel.

Completing an EditZone allows that portion of the document to be re-assigned into a further EditZone.

'Undo-Publish' reverses the 'publish' undertaken by the Contributor and places the EditZone into 'revise' and therefore locked. This option effectively reverses the decision by the Contributor that the EditZone is ready for review.

### 9.2.2 Contributor has Revised an EditZone

Once a Contributor has revised an EditZone the review Owner has the option to 'Complete' the EditZone or force a 'Publish'.

editzone history			
Ver 3	Revise	30 Sep 2011 10:11	<a href="#">Publish Complete</a>
Ver 2	Publish	30 Sep 2011 10:08	
Ver 1	Publish	30 Sep 2011 10:07	

The complete option is the same as defined above.

The 'Publish' forces the EditZone to published state allowing Reviewers to make comments, etc.

### 9.2.3 Contributor has Downloaded an EditZone

If a Contributor has downloaded an EditZone but has not uploaded it with a status of either 'Revise' or 'Publish', it is possible to reset the EditZone.

zones on Sample policy document.doc

Paragraph Id 15

refresh

Zones

Type EditZones

Title	2.1 Summary
Paragraph range	15 to: 18
Description	
Assigned to	Jason Contributor
Status	In progress

Close

Reset

Navigate by: << editzones >>

Resetting the EditZone will revert back to the position before the download. Thus it will be make the EditZone available for review and any 'saves' the Contributor has made in the meantime will be lost.

## 9.3 Working with EditZones

In addition to the notes in the Contributor's section above, there are some rules and limitations with respect to EditZones which must be additionally noted.

### 9.3.1 Headers, Footers and Section Breaks

#### 9.3.1.1 Background – How it Works in Word

Headers and footers in a Word document are defined on a per-section basis. Sections are defined by a 'section break' which is stored inside a paragraph, and the headers and footers for each section are stored inside the section break at the end of that section (e.g. if there is only one section break in the document and it is at paragraph id 100, the headers and footers for section 1 are stored inside paragraph 100).

There is no section break at the end of the document; headers and footers for the final (or only) section are stored at the end of the document in a 'final section block', but this not inside any paragraph.

There are potentially three types of headers and three types of footers in a section: first page, even page and odd page (making six in total). Whether the first page header and footer are different is stored on a per-section basis (i.e. section 1 might have the first page header different whereas section 2 might not), but whether the even and odd page headers are different is stored on a per-document basis (i.e. the whole document must either have odd and even page headers, the same or not).

For each section, any header or footer that is not defined in that section is automatically taken from the section before. This is shown by the 'same as previous' button in Word, but in the XML it is just detected by the fact that the header or footer is not redefined in the subsequent section.

Any given section break may define any of the possible six headers or footers, and the remaining ones will automatically be "same as previous". The final section block is no different in this respect, so if all the headers in the final section are the same as the previous section, the final section block will contain no headers or footers.

### **9.3.1.2 PleaseReview Scenarios**

The result of the way Word handles headers, footers and section breaks (described above) means that the Contributor may or may not see headers and footers, depending on how the master Word document is constructed.

Various cases are explored below.

#### **Case 1: the EditZone does not contain any section breaks**

In this case, there will be no headers or footers defined in the EditZone. However, the Contributor may add a section break(s) to the document, and can define headers and footers on those section breaks.

On upload, PleaseReview will leave any section breaks added by the Contributor, but will delete any headers and footers included in them, so the headers and footers that appear in the document will not be affected.

#### **Case 2: the EditZone contains section breaks but no header and footer definitions**

In this case all the section breaks inside the EditZone document have all their headers and footers defined as 'same as previous'.

When the EditZone is downloaded it will have no headers and footers (because they are all 'same as previous', even the first one)

The Contributor can add or delete section breaks, or can change existing section breaks from 'same as previous' to having headers and footers defined.

When the EditZone is uploaded, PleaseReview will process this exactly the same as in Case 1, i.e. the new section breaks are all preserved, but any headers and footers, or edits, added by the Contributor will be lost

#### **Case 3: the EditZone contains one or more section breaks which have headers and footers defined.**

In this case, PleaseReview must allow the Contributor to edit the section breaks that have been downloaded.

When the EditZone is uploaded, PleaseReview will copy in all the section breaks from the EditZone into the merged master document, including their header and footer definitions.

Note: this is because it is not possible to work out which headers/footers are part of the original EditZone, and which ones have been added/edited by the Contributor.

Implications:

1. This does not mean that the Contributor will see all of the correct headers and footers in the document – if some of them are 'same as previous' and the previous is defined outside the EditZone, the Contributor will just see them as blank;
2. It also means a Contributor can potentially edit the headers and footers for parts of the document that are outside their EditZone (even for the whole document).

### **9.3.2 Bulleted Listings and Numbering**

Bulleted and number lists have a number of limitations due to the way in which they are handled by Word.

1. If a Contributor adds a new list item (i.e. bullet or number) to an existing list, it will display correctly in both the revised EditZone in the review, and in the downloaded master document;
2. If a Contributor changes a list from one form to another (for example, from a bulleted list to a numbered list), it will display correctly in the revised EditZone in the review, but in the downloaded master document it will have reverted to its original state;
3. If a Contributor adds a new list (i.e. not attached to an existing list) then the behavior will be as follows:
  - (a) if there is a previous bullet list before it, it will show as a bullet list in both the revised EditZone in the review and in the downloaded master document;
  - (b) if there is no list before it, it may be turned into a numbered list in the downloaded document.
4. If a Contributor adds new numbered list (i.e. not attached to an existing list), it may be turned into a bullet list, reflect the settings of a previous numbered list, or have the number continued from a previous numbered list.

## 10 Managing Reviews

Once a review has commenced it can be accessed from 'my reviews'.

The 'Reviews I own' tab provides overview information on all of your reviews and their progress.

### my reviews

[Reviews I'm in](#)
[Reviews I own](#)
[Search for reviews](#)
[Recycle bin](#)

Review status is ☒ Not started ☒ In progress ☐ Closed ☐ Completed
 Include: ☒ All workgroups

Due Date ^	Review Title	Status	Details	Review
	 phased review	Not Started	<a href="#">Select</a>	
7 May 2010 23:45	 a review for lists	On Hold	<a href="#">Select</a>	
6 Jun 2010 23:45	 Yet another review	In Progress	<a href="#">Select</a>	<a href="#">Enter</a>
6 Jun 2010 23:45	 Dave's review	In Progress	<a href="#">Select</a>	<a href="#">Enter</a>
6 Jun 2010 23:45	 Another review	In Progress	<a href="#">Select</a>	<a href="#">Enter</a>

[refresh](#)

[printable view](#)

Status	Description
Not Started	Reviews which have commenced (i.e. as a minimum you specified a review title and moved to Step 2 of the new review wizard) but you did not complete by selecting 'Start' or put 'On Hold' on the final 'verify details' screen.
On Hold	Reviews which you placed 'On Hold'.
In Progress	Reviews which you started and are in progress.
Closed	Reviews which are closed to further comment by Reviewers. All Authors are still able to 'Accept' and 'Close' comments.
Completed	Reviews which have been completed and are placed in a read-only state. Once completed, reviews stay in this status until deleted.
Overdue	Reviews which are 'In Progress' but have passed their due date.

Notes:

- To view the status of the Reviewers in a review, 'mouse over' the 'Select' link;
- The 'Select' link opens the review control panel;
- To enter the review click on the 'Enter' link;
- If the review does not have an 'Enter' link it is either 'Not Started' or is a ReviewFlow review.

### 10.1 Recycle Bin

The recycle bin (if available) will list deleted reviews. Deleted reviews will remain in the recycle bin for a system defined period before being automatically permanently deleted.

## my reviews

[Reviews I'm in](#)
[Reviews I own](#)
[Search for reviews](#)
[Recycle bin](#)

Include: ☐ All workgroups

Due Date 	Review Title	Review Owner	Review Status	Details
8 May 2010 15:49	 phased review	dave	Completed	<a href="#">Select</a>

[refresh](#)

[printable view](#)

Using 'Select' allows you to either 'Purge' or 'Restore' the review. Purge will delete the review permanently whilst restore will return it to 'Reviews I own'.

**Note: if you 'Purge' the review it will be deleted permanently and this action cannot be undone.**

### 10.2 Review Control Panel

The review control panel provides you with summary information about the review. It is subtly different from the Reviewer's review details screen.

Notes:

- The comment summary (see below) lists the status of the comments made by all Reviewers;
- The email status indicates whether there have been any email failures. In the event of email failures, you will also get a warning on the home page. Emails can be re-sent by clicking the 'Show' button and following instructions.

## review control panel - Version 4 User manual

### Version 4 User manual (id 854)

#### Review Status





Overdue (**Due: 30 May 2009 23:45**; Started: 15 May 2009 12:59)

[Extend deadline](#)

### participants

Name	Status	Role	Summary	Comments
Demo Author 1	In Progress	Author		1
Demo Author 2	Not Started	Author		0
Demo Contributor 1	In Progress	Author-Contributor		0
Demo Contributor 2	Not Started	Author-Contributor		0
Demo Owner	In Progress	Owner		0
Demo Reviewer 1	In Progress	Reviewer		11
Demo Reviewer 2	In Progress	Viewer		0
Demo Reviewer 3	In Progress	Reviewer		7
Demo Reviewer 4	In Progress	Reviewer		1

### comment summary

Document	Open	Accepted	Closed	Withdrawn
 Sample policy document	5	3	3	0
 sample ls	4	0	0	0
 pleasereview intro for PR demo	3	0	0	0
 demo image collection	2	0	0	0

[Printable View](#) [Show URLs](#) [Email Status](#) [Edit Details](#) [Delete Review](#)

[Status](#) [Download copy](#) [Notify](#) [View History](#)

[View Report](#)

[Enter Review](#)

[Review Closeout](#)

[Back](#)

- 'Edit Details' allows you to edit the review details. Please note: depending on your system policy settings, some restrictions may apply if the review has been started. For example, it may not be possible to delete participants if they have made comments, and it may not be possible for documents to be added to, or deleted from, the review;
- 'Show URLs' displays the URLs for the review to enable the Owner to invite participants as an alternative to the standard system generated emails;

## URLs for review Version 4 User manual

### enter the review

<http://demo.pleasetech.net/test4/Main/Default.aspx?action=loaddocument&reviewid=854>

### show review control panel

<http://demo.pleasetech.net/test4/Main/Default.aspx?action=doreview&reviewid=854>

These URLs can be used from outside PleaseReview (e.g. can be emailed or published on a web page).

Each will prompt the user to log in (unless already logged in) and enter the review or display the control panel respectively.

Note that the user must be a participant in the review or they will simply see an error message after logging in.

[Close](#)

- 'Delete Review' deletes the review or moves it to the recycle bin (if available). If the recycle bin is not available, the review will be deleted permanently.



**Please note: deleting a review will completely delete all traces of the review permanently. It is not possible to retrieve a review once deleted.**

- If the review has not been started and is 'On Hold', the status will be set to 'On Hold' and there will be a 'Start Review' button available.

**Review on hold (id 995)**

<b>Review Status</b>	On Hold (Due: 2 Jun 2009 23:45)	<b>Start Review</b>
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### 10.3 Transfer Ownership of a Review

The review Owner, if permitted by the system policy, is able to transfer ownership of a review to another member of the Workgroup with review Author permissions. This option is located under the 'Edit Details' option on the review control panel.

**edit review details - Version 4 User manual**

**review details**

<b>Title</b>	Version 4 User manual	<b>Edit</b>
<b>Description</b>		
<b>Status</b>	Overdue	
<b>End Date</b>	30 May 2009 23:45	
<b>Transfer Ownership To</b>	<input type="text" value="Demo Author 1"/> <input type="button" value="Transfer"/>	

**participants**

<b>Name</b>	<b>Email</b>	<b>Role</b>
Demo A	hor.1@p	set

Notes on review ownership transfer by the Owner:

- The review Owner can only transfer ownership to another user with Author permissions in the Workgroup. If that user is not a member of the review they will be added to the review as a participant;
- Once transferred, the original review Owner cannot 'reclaim' ownership of the review. It must be transferred back to the original review Owner by the current review Owner, Workgroup Administrator or System Administrator;
- The original review Owner will remain a review participant whose role in the review is determined by a configurable system setting.

### 10.4 Review Closeout

The 'review closeout' screen is accessed from the review control panel. This allows the review Owner to close the review to further comments, send reconciliation emails, and download the documents/reports required.

## review closeout - sample policy document


### review details

<b>Title</b>	sample policy document
<b>Description</b>	
<b>Status</b>	In Progress
<b>End Date</b>	5 Jun 2009 23:45
<b>Open comments</b>	0

### actions

<a href="#">Close review</a>	Updates the review status such that reviewers can no longer comment on the document.
<a href="#">Complete review</a>	Updates the review status such that no further updates can be made.

### download documents with comments marked as tracked changes

File name	Title	Select Comments Details
 Sample policy document.doc	Sample policy document	<a href="#">Download</a>

[Back](#)

### 10.4.1 Closing vs Completing a Review

The review Owner has the option to 'Close' the review or to 'Complete' the review.

Closing the review is a status which:

- Prevents Reviewers from making further comments on the review (they see it as read-only);
- Permits those with Author permissions on the review to make comments and changes, and 'Accept' and 'Close' comments and changes.

Making the review 'Completed' is a status which:

- Makes the review read-only for everyone;
- May have licensing implications if your organization is licensed under an 'Active' user model. In completing the review it is no longer considered 'Active'.

Closing or completing the review initiates other options. Selecting 'Close review' will deliver the following action options:

### actions

<a href="#">Send reconciliation emails</a>	Sends each reviewer an email with the status and reconciliation for all the comments and threads they participated in.
<a href="#">Complete review</a>	Updates the review status such that no further updates can be made.
<a href="#">Re-open review</a>	Re-opens a closed or completed review so that reviewers can make more comments. Invitations and reminders will not be re-generated.

- Selecting 'Complete review' will deliver the following action options:

#### actions

<b>Send reconciliation emails</b>	Sends each reviewer an email with the status and reconciliation for all the comments and threads they participated in.
<b>Re-open review</b>	Re-opens a closed or completed review so that reviewers can make more comments. Invitations and reminders will not be re-generated.

- Selecting 'Send reconciliation emails' will send an email to each participant advising them that the review is closed to further comment, and providing them with a link to the reconciliation report. This should be sent once the Authors have completed accepting and closing comments;
- Selecting 'Re-open review', if enabled (it is a system policy setting), will re-open the review.

#### 10.4.2 Auto-complete of a Review

If defined by a system policy setting, a review may be auto-completed. This will automatically move the review to 'Completed' status.

Assuming it is enabled at system policy level, 'auto-complete' will automatically 'complete' overdue reviews (i.e. move to the status 'completed') 'n' days after the last activity on the review.





Activity is defined by an update to the review (such as a comment/change, or an accept/close). Activity is not simply entering the review.

Only overdue reviews are affected and the period 'n' is defined by a system policy setting. It is not possible for a review owner to 'opt out' of auto-complete. Review owners are notified by email that the review has been auto-completed.

#### 10.5 Retrieving Comments

The review closeout screen allows the review Owner to download reviewed documents, complete with aggregated comments and proposed changes for Word, Excel and PDF (depends on settings – see below), and access a report for other formats.

#### download documents with comments marked as tracked changes

		Select Comments
File name	Title	Details
 Sample policy document.doc	Sample policy document	<a href="#">Download</a>
 sample ls.pdf	sample ls	<a href="#">Download</a>
 pleasereview intro for PR demo.ppt	pleasereview intro for PR demo	<a href="#">Display</a>
 demo image collection	demo image collection	<a href="#">Display</a>

[Back](#)

The document/report is retrieved by selecting the 'Download' or 'Display' link. It is possible to define which comments, etc. appear in the document/report using the 'Select Comments' link, as shown below:

Select comments by:

Status	<input type="checkbox"/> All <input type="checkbox"/> Closed <input checked="" type="checkbox"/> Accepted <input checked="" type="checkbox"/> Open																																																	
Type of comment	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> General <input checked="" type="checkbox"/> Comment <input checked="" type="checkbox"/> Proposed Change																																																	
Comment category	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Minor <input checked="" type="checkbox"/> Major <input checked="" type="checkbox"/> Cosmetic <input checked="" type="checkbox"/> <Blank>																																																	
Participant	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Demo Author 1 <input checked="" type="radio"/> Made a comment <input checked="" type="checkbox"/> Demo Author 2 <input type="radio"/> Participated in discussion <input checked="" type="checkbox"/> Demo Contributor 1 <input checked="" type="checkbox"/> Demo Contributor 2 <input checked="" type="checkbox"/> Demo Owner <input checked="" type="checkbox"/> Demo Reviewer 1 <input checked="" type="checkbox"/> Demo Reviewer 2 <input checked="" type="checkbox"/> Demo Reviewer 3 <input checked="" type="checkbox"/> Demo Reviewer 4																																																	
Date	<input checked="" type="radio"/> All <input type="radio"/> Since I entered the review 2 Jun 2009 10:46 <input type="button" value="v"/> <input type="radio"/> Since: date : <input type="text" value=""/> time : <input type="text" value="00"/> <input type="text" value="00"/> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <div style="text-align: center; border-bottom: 1px solid black;">June 2009</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th><th>Sun</th></tr> </thead> <tbody> <tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr> <tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> </tbody> </table> </div>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5
Mon	Tue	Wed	Thu	Fri	Sat	Sun																																												
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29	30	1	2	3	4	5																																												

The default position is shown above. So, by default, the downloaded document/ displayed report does not contain closed comments, but does include all open and accepted comments from all participants.

### 10.5.1 Word Document 'Round-tripping'

For Microsoft Word there are additional options which define how comments and proposed changes are included in Word.

**Note: these options are applied to the comments, etc. which are selected for inclusion in the Word document using the 'Select Comments' option described above.**

There are two high level options: 'Tracked Changes' or 'Comments only' which are selected via radio buttons – see below.

**Selections specific to Microsoft Word documents:**

☒ **Tracked Changes** 'Tracked Changes' option

☒ Open as tracked; accepted as normal text (default)  
☐ Accepted as tracked; open as comments  
☐ Include a Word comment whenever changing the document  
☐ Produce a clean set of comments (no replies or status information)

☐ Comment author:  initials   
☐ Comment date:  date:

'Comments only' option

☐ Comments only

☐ Include Paragraph IDs

☐ Clean download - removes Word "metadata" and previous tracked changes

☐ Debugging options

Selecting the 'Comments only' radio button means that no changes are made to the document, and all comments and proposed changes are included in the Word document as Word comments only.

Selecting the 'Tracked Changes' radio button opens up other options which are discussed below:

The default position (shown above) is 'Open as tracked; accepted as normal text'.

☒ **Tracked Changes**

☒ Open as tracked; accepted as normal text (default)  
☐ Accepted as tracked; open as comments

This means that comments, etc. are rendered into Word as described below.

**PleaseReview  
Comment status**

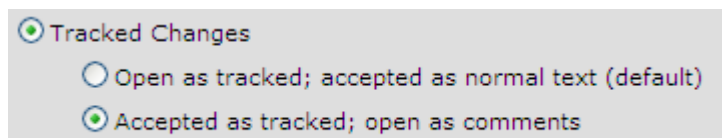
**Appears in the Word document as**

Accepted or Open Comments	Appear in the Word document as Word comments.
Accepted Proposed Changes	Replace the paragraph. In other words, the new wording is inserted in the document in place of the old paragraph.
Open Proposed Changes	Are inserted in the Word document as 'red lined' tracked changes for the appropriate text.
Closed Comments, Proposed Changes	Are always rendered into the Word document as Word comments. Note: in the default comment selection, closed comments, etc. are not rendered into the document.

This would be the typical case where you were authoring a document for internal use and then wanted to incorporate the changes into the Word document.

However, it may be that you want to include accepted proposed changes in Word as tracked changes (for example if it is intended that the document is to be returned to a 3<sup>rd</sup> party with changes highlighted).

This is catered for with the 'Accepted as tracked; open as comments' option.

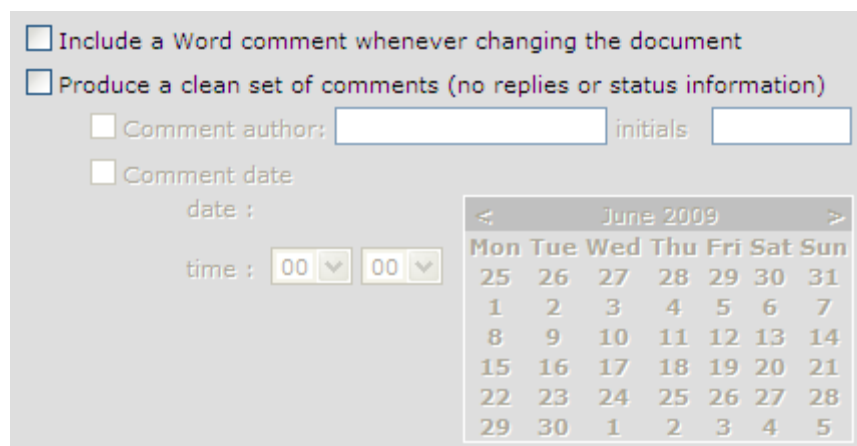


This means that comments, etc. are rendered into Word as described below.

PleaseReview Comment status	Action
Accepted or Open Comments	Appear in the Word document as Word comments.
Accepted Proposed Changes	Are inserted in the Word document as 'red lined' tracked changes for the appropriate text.
Open Proposed Changes	Are inserted in the Word document as Word comments.
Closed Comments, Proposed Changes	Are always rendered into the Word document as Word comments. Note: in the default comment selection, closed comments, etc. are not rendered into the document.

Accepted or Open Comments	Appear in the Word document as Word comments.
Accepted Proposed Changes	Are inserted in the Word document as 'red lined' tracked changes for the appropriate text.
Open Proposed Changes	Are inserted in the Word document as Word comments.
Closed Comments, Proposed Changes	Are always rendered into the Word document as Word comments. Note: in the default comment selection, closed comments, etc. are not rendered into the document.

There are other checkbox options which apply to both the above:

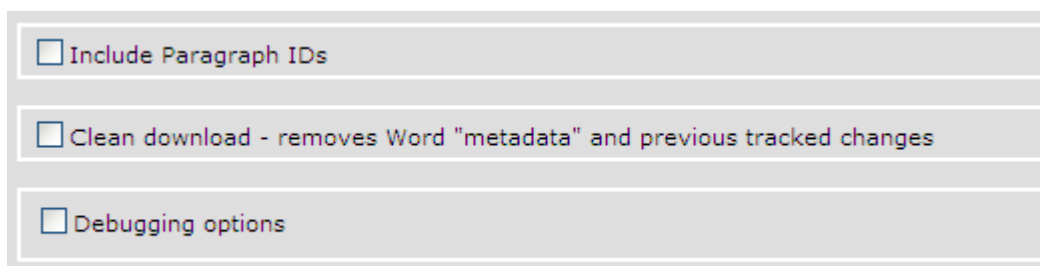


Checkbox item	Effect
Include a Word comment whenever changing the document	In addition to inserting the text into the Word document, the entire proposed change is included as a Word comment. This allows you to see the previous paragraph/word text for comparison.
Produce a clean set of comments (no replies or	Allows you to generalize and set-up the 'author' and date/time of the tracked changes

status information)

as seen by Word. So, for example, if multiple people have contributed to the document and you want all comments, tracked changes, etc. to appear to have come from a single source (for example your company name), this option will allow you to set the name and initial used by Word as the author of the comments and tracked changes. Likewise, the date and time setting will determine the apparent date and time of the comments and tracked changes.

The remaining options are listed below:



☐ Include Paragraph IDs

☐ Clean download - removes Word "metadata" and previous tracked changes

☐ Debugging options

#### Checkbox item

Include Paragraph IDs

#### Effect

Selecting this option means that the Word document will be downloaded with each paragraph number inserted in blue in square brackets, for example: [12].

Clean download – removes Word "metadata" and previous tracked changes

Word metadata is defined as all information contained in the Word document which is not document text itself.

Selecting this option will do the following:

- Remove all standard document properties (these are found under the Word File → Properties menu item and then by selecting the 'Summary' tab);
- Remove all custom document attributes (these are found under the Word File → Properties menu item and then by selecting the 'Custom' tab);
- Remove all previous tracked changes (i.e. those which may have been in the document prior to its upload into PleaseReview) by 'accepting' all previously proposed tracked changes. This has the effect of keeping inserted text and removing deleted text;
- Remove all previous Word comments (i.e. those which may have been in the

document prior to its upload into PleaseReview);

- Remove all text formatted as hidden.

All tracked changes and comments inserted by PleaseReview as part of the document download are not affected.

Note: If this option is selected, it will overwrite any information you have entered in the 'Produce a clean set of comments (no replies or status information)' option.

Debugging options

This option should only be used under the supervision of support.

### General Notes:

- Once you have downloaded the Word document with the mark-up as described above, you are in Word and all standard Word functionality appears;
- It is possible to download the Word document until the review is deleted;
- Round-tripped paragraphs in the Word document which have accepted or open proposed changes will retain any formatting, field codes, footnotes, endnotes, images, etc. The only Word structures not retained are Word drawing objects, i.e. those generally found on the 'Drawing' toolbar in Word. PleaseReview will automatically recognize paragraphs containing such objects and convert the proposed change into a Word comment to preserve these items. The review Owner will then need to manually edit the paragraph.

### 10.5.2 Excel Document 'Round-tripping'

By default the comments and proposed changes in the downloaded Excel document will be rendered as follows:

<b>PleaseReview Comment Status</b>	<b>Action</b>
Closed or Withdrawn comments of all types	Do not appear in the Excel document by default. If included, will always appear as Excel comments.
Accepted or Open comments	Appear in the Excel document as Excel comments.
Accepted Proposed Changes	Replace the paragraph. In other words, the new wording is inserted in the document in place of the old paragraph.
Open Proposed Changes	Are inserted into the Excel document as Excel comments.

Note: If the uploaded spreadsheet is 2003 (xls) format, accepted proposed changes to formula cells are shown in the downloaded document as comments, not by updating the cell contents.



### 10.5.3 PDF Document Download/Display

PDF differs from other formats with respect to the download and close-out options.

If you have selected the 'Use Acrobat plug-in' option under your personal settings, you will see a 'Download' link and will receive a PDF document. If you have selected the 'Review as images' option under your personal settings, you will see a 'Display' link and will receive a report.

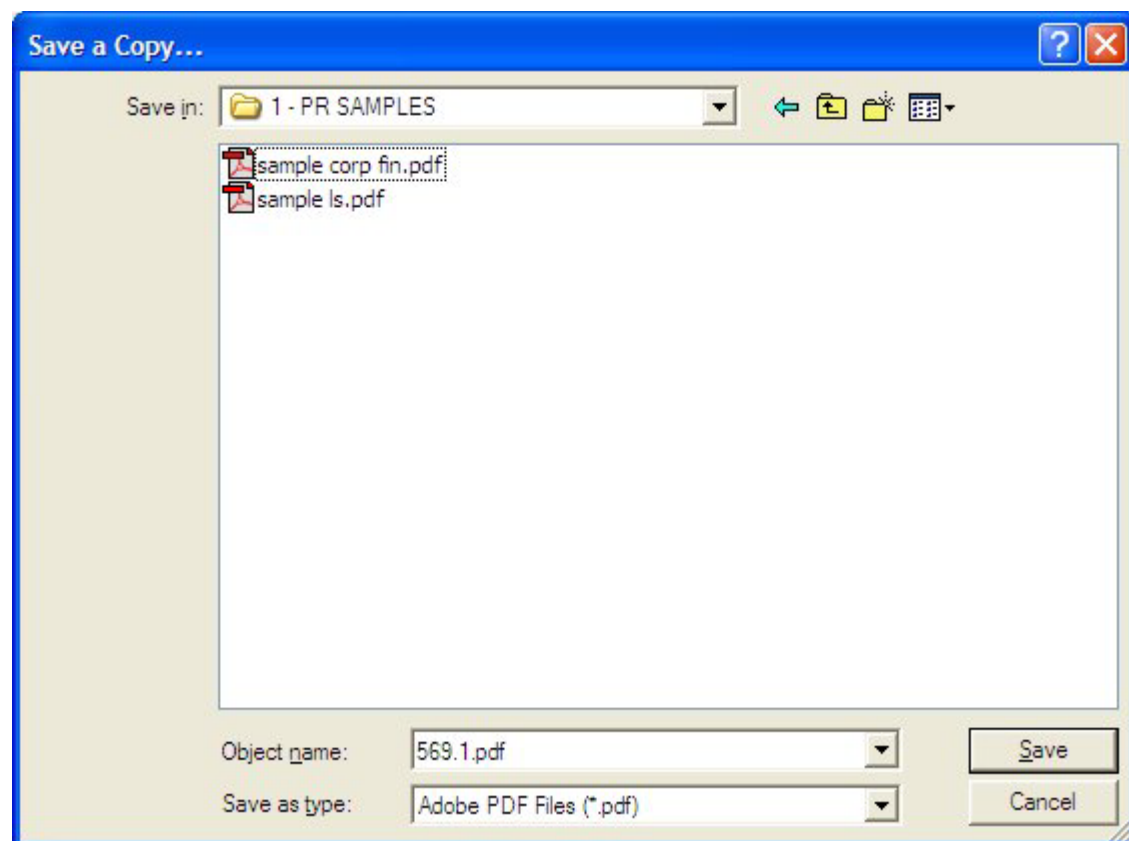
☐ Use Acrobat plug-in ☒ Review as images

**10.5.3.1** *Note: regardless of your PleaseReview settings the PDF document download functionality is only available if you have a copy of Acrobat Standard or Professional and the PleaseReview PDF plug-in installed.*

#### 10.5.3.2

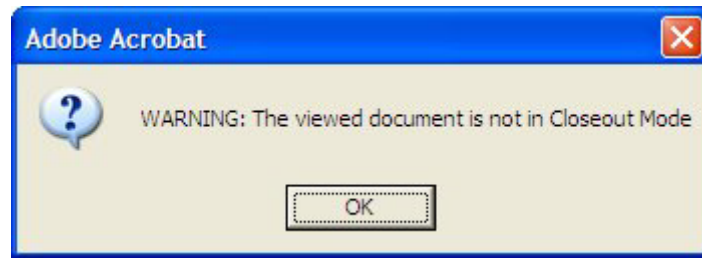
#### 10.5.3.3 PDF Document Download

Selecting 'Download' for a PDF file from the review closeout screen will open the PDF document in a new window and automatically display the 'Save a copy ...' screen:



Note: The selection in the 'Select Comments' will apply (see [PDF-Specific Comments Selection Options](#) for PDF-specific options).

In order to place the PDF file into close-out mode, you must save a copy of the file to a known location on the file system. If you simply cancel this dialog you will receive a warning:



**Note: You must save the file in close-out mode or not all comments will be correctly saved and displayed in the PDF file.**

Once the PDF file is saved in close-out mode, you can open it in your copy of Acrobat (not the browser).

Close-out mode has different connotations depending on whether you have selected 'PDF Style comments' (the default) or 'PleaseReview Style comments'.

With the default of 'PDF Style Comments' all comments are saved as native PDF comments, can be viewed by anyone with a PDF viewer and can be manipulated by the standard tools in the PDF viewer.

With 'PleaseReview Style Comments' all comments are saved as PleaseReview comments and can only be seen by users with Adobe® Acrobat® (Standard or higher) with the PleaseReview plug-in installed.

This means that you will still have all the standard functionality available (i.e. the ability to click on comments and open the comment box, the ability to 'mouse over' comments to highlight the associated text or area, etc.) but the file is not connected to PleaseReview (i.e. 'Offline') and you are able to delete comments.

So, if you are updating a source document or compiling a report from the comments in the PDF file, you can open the PDF, view the comments, etc. (copying and pasting as appropriate), and then delete the comment once it has served its purpose.

#### **10.5.3.4 PDF-Specific Comments Selection Options**

If the review contains a PDF document, the comments selector window will include a section entitled 'Selections specific to PDF documents' (as shown below). The default setting is for native PDF-style comments. In the event of a mixed document type review which also contains Word documents, this section will be below the equivalent Word section.

The options are shown below:

**Selections specific to PDF documents:**

☒ Native PDF comments  
☐ PleaseReview style comments

☐ Produce a clean set of comments (no replies or status information)

☐ Comment author:

☐ Comment date  
 date :          
 time :

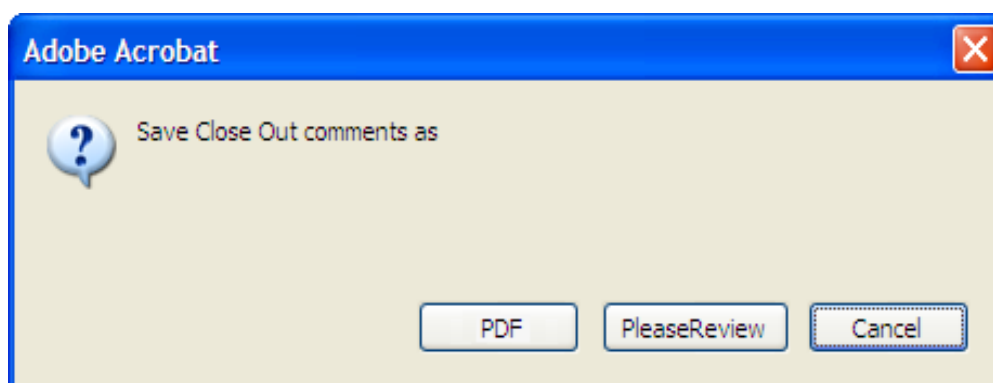
June 2009						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

It is possible to select either 'Native PDF comments', which will display the PDF with Acrobat style mark-up and sticky notes, or 'PleaseReview style comments', which will display the PDF with standard PleaseReview icons.

If the document has been downloaded with PleaseReview style comments selected, the comments will only be available to individuals who have the PleaseReview PDF plug-in installed. If the document has been downloaded with Native PDF comments it can be viewed by anyone with a PDF viewer that supports Adobe Acrobat annotations.

The 'Produce a clean set of comments' option removes replies and comment status information, and further options allow the specification of the name of the comment author and the date/time of the comments as they will appear in the PDF document.

Note: In the event that the PDF plug-in is v3.1 but the server has not been upgraded (i.e. does not include this screen), the plug-in will automatically detect this and offer the user the option of native PDF comments or PleaseReview comments. See below.



All other actions will be the same as the previous version.

Note: if you are operating with the latest plug-in and the v3.1 server you will not normally see this dialog.

### 10.5.3.5 PDF Document Report Display

The PDF comment report displayed will be substantially the same as the reconciliation report and will contain scaled down copies of the pages which contain comments, with the location of each comment identified and numbered.

The comment listing contains all comments, the numbers of which refer back to the numbers on the image of the PDF page, as shown below.

**Scaled copy of the PDF page shown as an image with comment locations identified and numbered**

**Comment listing following standard report format**

Posn	Text	T	Comment	S	Author comment
[1]		C	Comment (3) by Demo Reviewer 1 on 26 May 2009 12:24 Category : Minor Demo Reviewer 1 (26 May 2009 12:24) This is my comment here	○	
[2]		P	Proposed Change (1) by Demo Reviewer 2 on 26 May 2009 12:21 Category : Minor The Beatles have lost their <del>count-down</del> <b>this is a change</b> against Apple Computer over its iPod and iTunes download service. Demo Reviewer 2 (26 May 2009 12:21)	○	
[3]		C	Comment (2) by Demo Reviewer 2 on 26 May 2009 12:22 Category : Minor Demo Reviewer 2 (26 May 2009 12:22) Who is this then?	○	

#### 10.5.4 Plain Text Document Download

For plain text documents, accepted proposed changes simply replace the existing text.

All other comments and proposed changes (i.e. open and accepted comments, open proposed changes and anything closed – if selected) are inserted into the document with a preceding '---TODO:', as shown below:

```
---TODO: PleaseReview: Comment on line 1 by Demo User 2 (19 May 2008
10:42) Accepted 19 May 2008 11:25: Accepted: my acceptance reason
----    a comment here
```

This document is designed as a reference source for users of PleaseReview.

```
---TODO: PleaseReview: Comment on line 3 by Demo User 1 (19 May 2008
10:40) Accepted 19 May 2008 11:26: Accepted: my other acceptance
reason
```

```
----    This is demol's comment
```

```
---TODO: PleaseReview: Comment on line 3 by Demo User 2 (19 May 2008
10:41)
```

```
----    Demo2's comment on line 3
```

#### 10.5.5 Other Document Formats

For other document formats the Owner has access to an HTML report of the comments. This is the same as the reconciliation report but is document-specific. This enables the Owner to view the comments in a single report and can be used as a reference for updating the source document or sending comments to 3<sup>rd</sup> parties, etc.

## 10.6 Multi-phase Review Control

The review control panel for a multi-phase review shows the progress of the phases rather than the individual Reviewers in each phase.

The Owner can ascertain the status of each individual Reviewer in each phase by selecting the 'details' option.

### review control panel - User manual ReviewFlow


**User manual ReviewFlow (id 988)**

**Review Status** In Progress (Due: 9 Jun 2009 14:48; Started: 1 Jun 2009 14:48)

**review phases**

Title	Days	Status			
User manual ReviewFlow phase 1	2	In Progress	<a href="#">details</a>	<a href="#">enter</a>	<a href="#">closeout</a>
User manual ReviewFlow phase 2	2	Not Started	<a href="#">details</a>		
User manual ReviewFlow phase 3	2	Not Started	<a href="#">details</a>		
User manual ReviewFlow phase 4	2	Not Started	<a href="#">details</a>		

**comment summary (User manual ReviewFlow phase 1)**

Document	Open	Accepted	Closed	Withdrawn
 Sample policy document	0	0	0	0

[Edit Details](#) [Delete Review](#)

[Back](#)

The 'closeout' link takes the Owner to the close-out screen for the phase where the previous comment selection can be overridden prior to starting the next phase.

**actions**

<a href="#">Close review</a>	Updates the review status such that reviewers can no longer comment on the document.
<a href="#">Next phase</a>	Completes this phase such that no further updates can be made and starts the next phase.  The selected comments will be transferred into the next phase: <input type="radio"/> All <input type="radio"/> Only accepted comments <input checked="" type="radio"/> None

Notes:

- Once comments have been copied between phases they are not separately identified;
- If the comments carried forward are by a Reviewer not included in the current review phase, the comments will still be credited to the Reviewer which made them. It is possible for Reviewers in the current phase to 'Reply' to the comments but the original Reviewer is unable to see the reply or join in the discussion – only Reviewers in the current phase can see the discussion and join in;
- Re-opening closed reviews (see [Review Closeout](#)) is not available in multi-phase reviews.

## 11 Source Code Review

This section provides detail of the code review functionality introduced in v3.5 of PleaseReview.

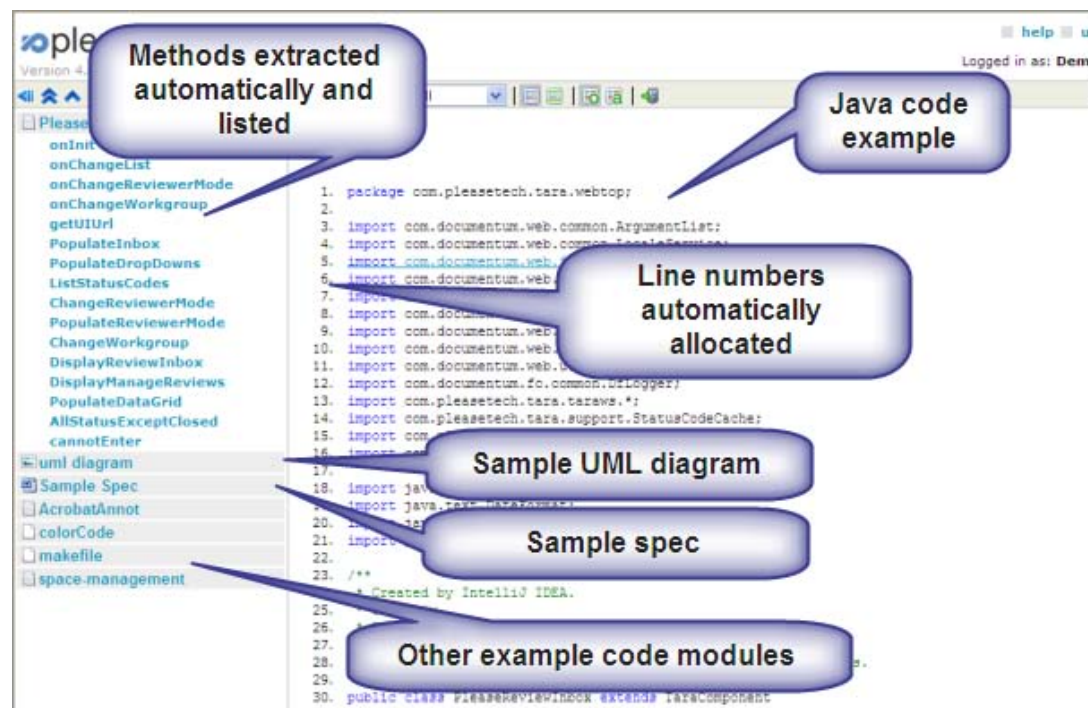
PleaseReview supports the review of source code (and other plain text file types) directly through the standard PleaseReview interface. C, C++, C#, Java, ADA vhdl, fortran and xml source are directly supported for syntax highlighting.

Key features are:

- Syntax highlighting;
- Extraction of method names for a 'table of contents';
- Support for different line endings;
- Any unknown file type may be treated as plain text;
- Split screen view allows the Reviewer to navigate to two different places in the same module at once;
- Document close-out download will automatically update code with accepted proposed changes, and insert PleaseReview comments as comments into the source file.

### 11.1 In the Review

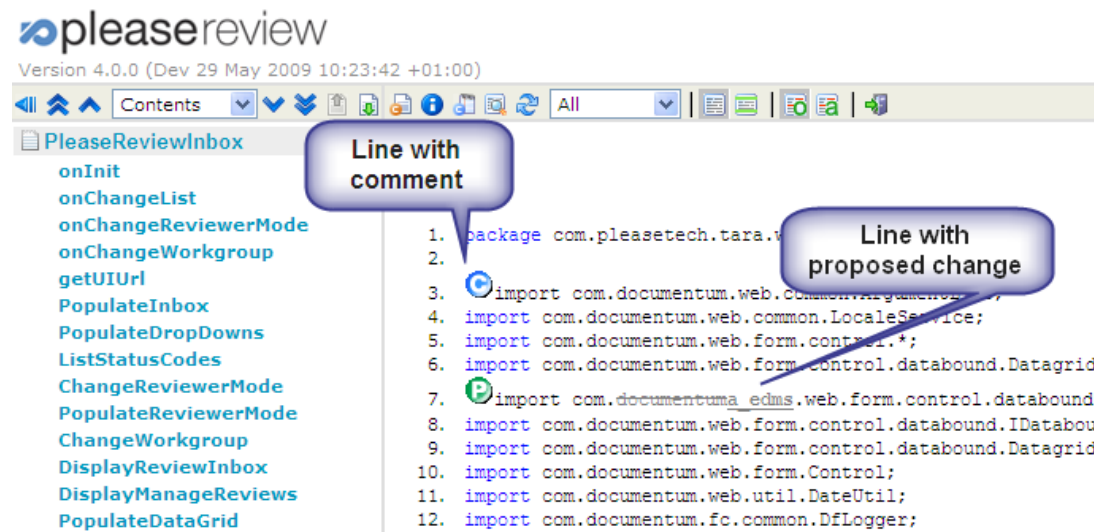
The code is presented in the right hand 'document pane' with the left hand 'navigation pane' displaying the methods in the code when 'Contents' is selected. The method names are automatically extracted.



To make a comment or propose a change, the Reviewer simply selects the line by clicking on it. The standard PleaseReview comment window (or comment pane) opens. The comment window (or pane) operates as described elsewhere in the manual and permits proposed changes and comments as well as categorization.

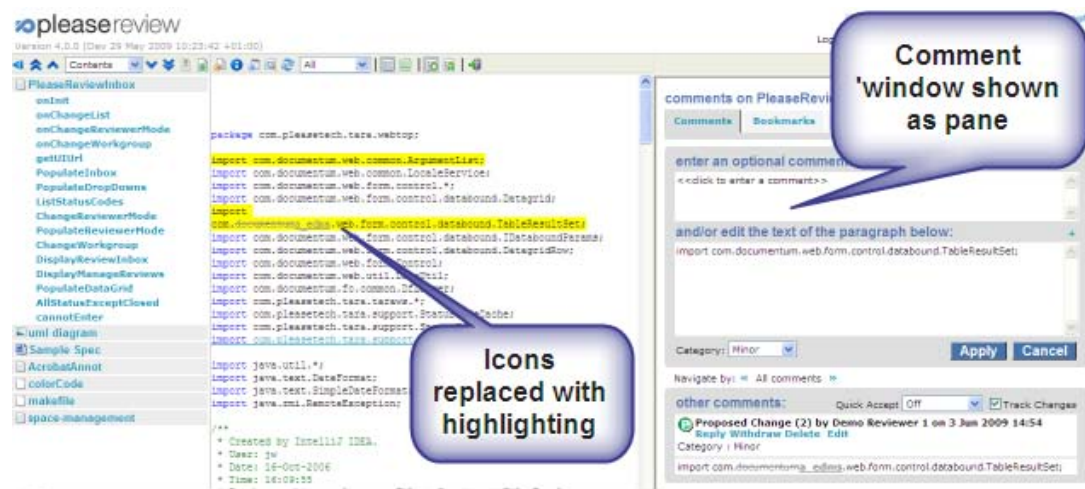


Lines with comments and/or proposed changes are identified with the standard PleaseReview icon.



### 11.1.1 Alternative Views

All standard PleaseReview options work as previously described. Each Reviewer may select the appropriate combination to suit their preference. An example is shown below:

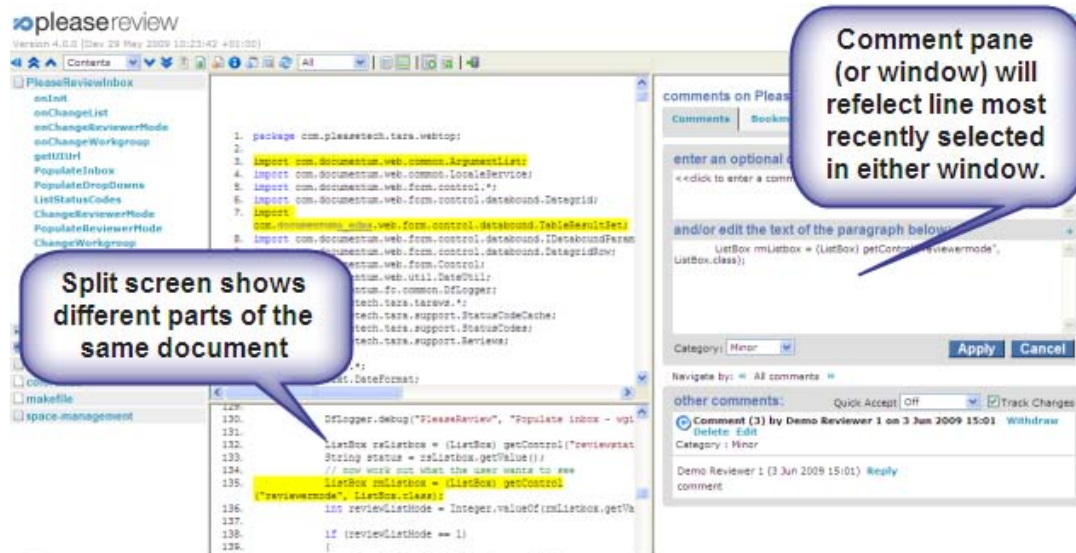


### 11.1.2 Split Screen View

Additionally, when reviewing code only, there is the option of a split screen which allows the Reviewer to navigate to two different places in the same module/document at once.

The split screen view is selected using the 'Layout' view icon on the toolbar.

Either screen area may be used for commenting. When you navigate using the navigation pane or comment window, the top pane is scrolled to the correct location. The comment pane (or window) will reflect the line most recently selected.



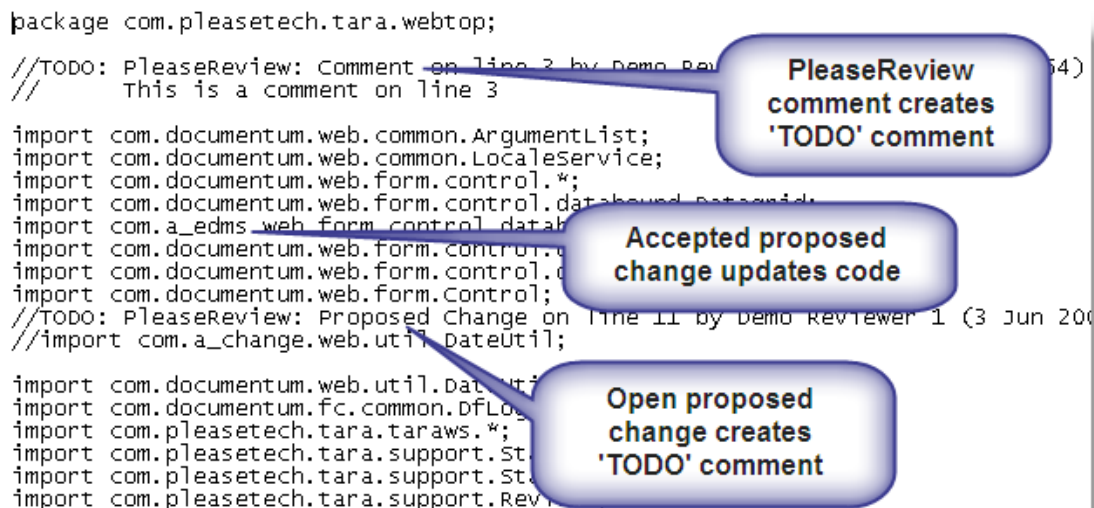
## 11.2 Review Owner Notes

### 11.2.1 Creating the Review

Source code files are supported by default. The file extensions for C, C++, C#, Java, ADA, VHDL, Fortran and Xml are known to PleaseReview and will automatically be picked up on document upload.

### 11.2.2 Code File Download

Source code files are fully 'round tripped' and thus accepted proposed changes are incorporated directly into the file. Open (or closed – if selected) changes and all comments are entered into the code as TODO comments. This is shown below.

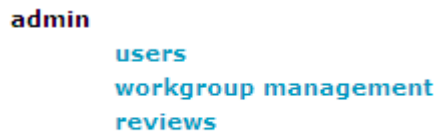




## 12 Workgroup Administration

The Workgroup Administrator has additional administration capabilities. These cover some user management and management of the shared distribution lists.

Please note: the extent of a Workgroup Administrator's permissions is defined by the system policy and therefore you may not have all of the permissions listed here. The 'admin' menu will list the options available to the Workgroup Administrator.



### 12.1 Shared Distribution Lists

Shared distribution lists are available to all review Owners in a workgroup and are workgroup-specific.

Workgroup Administrators have the ability to create, edit and delete shared distribution lists.

Their operation is the same as for personal distribution lists.

### 12.2 User Administration

Workgroup Administrators have the ability to add, edit the role of, and delete users from the workgroup, if enabled. They also have the ability, if enabled, to add users to the system within the license limits.

- Editing a user allows the Workgroup Administrator to change a user's role within the workgroup, subject to license limits;
- Deleting a user removes the user from the workgroup, not the system. Note: for licensing purposes, a user is only counted if they are a member of a workgroup. If not, the user cannot Login and is not counted in the license limits.

### 12.2.1 Adding Users

Workgroup Administrators have the ability to add new users to PleaseReview, subject to the license limits. This can be undertaken one at a time or a .csv file of users can be imported.

#### user administration

The screenshot shows the 'user administration' interface. At the top, there is a 'User details' section with a text input field and a 'Find' button. Below this is a checkbox labeled 'Display users who are not enabled'. A paragraph of text explains the search functionality: 'If the user is already known to the system, locate them by entering part of either their user name, email address or full name and pressing "go". This will bring back users starting with the value you entered. If you want to search for users containing certain characters, use "\*" as a wildcard. for instance, entering "jones" will return users ending in jones; entering "jones\*" will bring back all users containing jones.' At the bottom, there is a link 'Add new user' and a note: 'If the user is new to the system, click "add new user".'

Notes for adding a single user:

- Search for the user following the on-screen instructions and a list of existing users matching the criteria will be returned;

#### user administration

The screenshot shows the 'user administration' interface with a search result. The 'User details' section has the text 'de\*' entered in the input field. Below the search bar is a table with the following columns: 'Email address', 'User name', 'Full name', and 'Select'. The table contains 10 rows of user data. At the bottom, there is a link 'Add new user' and a note: 'If the user is new to the system, click "add new user".'

Email address	User name	Full name	Select
Demo_Owner@pleasetech.com	DO	Demo Owner	Select
Demo_Contributor_1@pleasetech.com	Dc1	Demo Contributor 1	Select
Demo_Contributor_2@pleasetech.com	dc2	Demo Contributor 2	Select
Demo_Author_1@pleasetech.com	da1	Demo Author 1	Select
Demo_Author_2@pleasetech.com	da2	Demo Author 2	Select
Demo_Reviewer_1@pleasetech.com	dr1	Demo Reviewer 1	Select
Demo_Reviewer_2@pleasetech.com	dr2	Demo Reviewer 2	Select
Demo_Reviewer_3@pleasetech.com	dr3	Demo Reviewer 3	Select
Demo_Reviewer_4@pleasetech.com	dr4	Demo Reviewer 4	Select

- Select the appropriate user and the actions you take will be dependent upon the system policy settings. In the most 'open' settings, you have full capability to amend all of the user details. Notes:
  - Do not use 'Folder view'
  - You can use the 'Workgroups' button to specify workgroup roles.
- If the user is not registered on the system, select the 'Add new user' option and complete the details.

Please note: Workgroup Administrators cannot create Monitors.

### 12.3 Workgroup Management

If enabled, Workgroup Administrators are able to manage the participants in a workgroup.

Select 'workgroup management' and this will list the workgroups of which you have administration permissions.

#### workgroup management

current workgroups	
Workgroup Name	
demo	<a href="#">Members</a>
Demo-1	<a href="#">Members</a>

Selecting 'Members' will list all members of the workgroup and from that list you are able to edit (including workgroup role) or remove the members.

### 12.4 Transferring Review Ownership

Workgroup Administrators may transfer ownership of a review to another workgroup member with the appropriate permissions, if enabled.

Use the 'Search for reviews' tab to locate the review which is to be transferred. Follow the on-screen instructions.

[Reviews I'm in](#)
[Reviews I own](#)
[Search for reviews](#)
[Recycle bin](#)

Enter title or id  
Include: ☐ Deleted reviews ☐ All workgroups

Due Date	Review Title	Review Owner	Review Status	Details	Review
No reviews to display					

[refresh](#)

[printable view](#)

The search will return all reviews whose title starts with the value you entered.  
If you want to search for review titles containing certain characters, use \* as a wildcard. for instance, entering \***design** will return reviews ending in **design**; entering **\*design\*** will bring back all reviews containing **design**.

The search will return a list of reviews matching the data entered.

[Reviews I'm in](#)
[Reviews I own](#)
[Search for reviews](#)
[Recycle bin](#)

Enter title or id  
Include: ☐ Deleted reviews ☐ All workgroups

Due Date 	Review Title	Review Owner	Review Status	Details	Review
21 Jan 2011 23:45	 acronym test	Sue O'Connell	Overdue	<a href="#">Select</a>	<a href="#">Enter</a>
18 Dec 2010 23:45	 CA test	Sue O'Connell	Not Started	<a href="#">Select</a>	
18 Apr 2010 23:45	 #6 test	Sue O'Connell	Closed	<a href="#">Select</a>	<a href="#">Enter</a>

[refresh](#)

Click on 'Select' against the review to be transferred. The 'Review Control Panel' for the selected review will then be displayed. Click on 'Edit Details' at the bottom of the Review Control Panel to display the 'edit review details' screen.

## edit review details - acronym test


**review details**
Edit

<b>Title</b>	acronym test		
<b>Description</b>			
<b>Status</b>	Overdue		
<b>End Date</b>	21 Jan 2011 23:45		
<b>Transfer Ownership To</b>	<div> dave ▼ <div> dave Jane sue </div> </div>	<a href="#">Transfer</a>	

**participants**
Edit

Name	Email	Role
Jane	sue1@pleaseaction.com	Reviewer
Sue O'Connell	sue.oconnell@pleasetech.com	Owner
sue2 Monitor	sue2@pleaseaction.com	Reviewer

**documents**
Edit

File name	Title	Preparation	
 acronym test.doc	acronym test.doc	Successful	<a href="#">Preview</a>

[Delete Review](#)
[Review Options](#)
OK

The drop-down box against 'Transfer Ownership To' contains the name of all other users who have permissions to own reviews in the workgroup. Simply select the name of the new owner and select the 'transfer' link. The review will be transferred.

Notes on review ownership transfer by Workgroup Administrators:

- The Administrator can only transfer ownership to any user with review ownership permissions in the workgroup. If that user is not a member of the review they will be added to the review as a participant;
- The Administrator does not need to be a participant in the review;
- The original review Owner will remain a review participant whose role in the review is determined by a configurable system setting.

## **13 The Monitor Role**

### **13.1 Monitor Role**

The monitor role is designed to permit quality assurance (QA) or management oversight of the review process, and is workgroup-based.

Monitors may enter any review in their workgroup(s) as a viewer. This is 'read only' access. Monitors are controlled by the System Administrator and will not appear on the review participant list.

### **13.2 Details of the Monitor Role**

Some rules associated with the monitor role are as follows:

1. A monitor's permissions are restricted to the workgroup(s) in which they are included;
2. There may be many monitors per workgroup;
3. Monitors may not be assigned to Taskgroups. Monitors will be able to automatically locate and monitor a review in a Taskgroup if the review contains at least one participant from a workgroup in which the monitor has monitor permissions (i.e. "a monitored participant"). So monitors will be able to monitor a review in a Taskgroup if it contains a monitored participant but will not be able to locate or monitor reviews in a Taskgroup which do not contain a monitored participant;
4. It is possible for an individual user to be a standard user in one workgroup (and not a monitor in that workgroup) and a monitor in another workgroup.

### **13.3 Being a Monitor**

There are two types of monitor:

1. Monitors who are not able to be review participants (i.e. not system users);
2. Monitors who are able to be review participants (i.e. are system users).

Monitors who are not system users are able to login to PleaseReview in the same manner as any other user. They will see an inbox (which will have nothing in – because they cannot be added to reviews) and will be able to search for reviews using the standard search capability (discussed later in the document). The search will return all reviews which meet the search criteria and the Monitor will be able to enter the review as a viewer. No input to the review or status setting is possible.

Monitors who are also system users will have the reviews to which they are invited in their inbox as normal. The review search will return all reviews which they are able to 'see'. Thus, the list will include both reviews to which they are invited and reviews over which they solely have monitor rights.

## **1 APPENDIX A – System Connector Integrations**

### **1.1 Introduction**

PleaseReview supports several system connectors which allow interaction with 3<sup>rd</sup> party repositories such as EMC Documentum, Qumas DocCompliance, MasterControl, Microsoft SharePoint and Open Text Content Server (formerly Livelink).

It is also possible to configure user authentication against 3<sup>rd</sup> party systems such as Active Directory and LDAP. Active Directory and LDAP are simply user authentication systems and do not have associated repositories.

The above systems are supported 'out-of-the-box'. However the system connector API's are available, and organizations may undertake their own integration and provide their own system connector.

Each system can support multiple system connectors and therefore multiple classes of users and repositories. The examples shown below are based on EMC Documentum but apply equally to the other system connectors.

This section concentrates on the differences between the standard PleaseReview environment and PleaseReview when logged in via a system connector.

In this context 'native PleaseReview users' are users managed through the native PleaseReview user management system and logged into PleaseReview through these credentials. Users authenticated through a system connector are 'system connector users'.

Integrations may be 'locked' or 'open'. Locked integrations are locked to the 3<sup>rd</sup> party system whilst open integrations may support multiple sources of documents or user authentication. Locking may occur at a repository level or a user level or at both.

For example, a system locked to a repository but configured as 'open' for users would only permit documents from the repository to be included in a review (it will not be possible to add documents from the file system to reviews) but would allow users authenticated via different authentication mechanisms to be included in the review.

Note: This section does not try and address the user interface integrations. It only addresses users using the PleaseReview interface via a system connector.

### **1.2 All Users**

The information in this section pertains to all users.

#### **1.2.1 Logging In**

As a system connector user you will use your 3<sup>rd</sup> party system credentials to Login. This is your user name and password from the 3<sup>rd</sup> party system.

##### **1.2.1.1 Multiple Login Contexts**

If you have the option of multiple system connectors and you are logging on for the first time, you will see an additional 'login' context drop-down on the login screen. This will list all the options available to you.



Once your login context has been established (at this first login) the information will be held as a cookie and you will not need to select the login context again whilst using the same profile and browser on the same PC.

Instead an 'Advanced options' link will appear on the login screen instead of the drop-down. You only need use this link if you need to change your login context.

Notes:

- The login context details are stored in a persistent cookie in your browser. If, for any reason, your browser cookies are removed, you will lose the data and will have to re-select your 3<sup>rd</sup> party Login context;
- Clicking on the 'Advanced options' link will display a drop-down list of available Login contexts.

### **1.2.2 Logged In (User Details)**

Note: only native PleaseReview users may have the option to reset their password (if allowed by system policy). Any other changes need to be performed by the system administrator.

PleaseReview is unable to change 3<sup>rd</sup> party-context passwords. Any changes to a user's 3<sup>rd</sup> party-context password must be undertaken through the 3<sup>rd</sup> party system.

### **1.3 Review Owners Only**

Information for review Owners is contained in a separate document.

## 2 Approval and Versioning

### 2.1 Approval

This document is digitally signed by:

<b>Author</b>	Sue O'Connell
<b>Approver</b>	David Cornwell
<b>Digital Signature of Approver</b>	

### 2.2 Version History

<b>Version</b>	<b>Date</b>	<b>Comments</b>
V1.0	Oct 2011	Updated for v4.2